

CITY COUNCIL WORK SESSION
on the Fiscal Year 2025-26 Recommended Budget & Proposed CIP

Municipal Center
1520 K Ave, Plano, TX 75074
Thursday, August 14, 2025 5:00 p.m.

This City Council Work Session will be held in person in the Senator Florence Shapiro Council Chambers and via videoconference. A quorum of the City Council, including the presiding officer, will participate in person. The facility will be open to members of the public.

For those wanting to watch the meeting but not address the Council, the meeting will be live-streamed on Plano's website at www.planotv.org, [YouTube.com/cityofplanotexas](https://www.youtube.com/c/cityofplanotexas) and [Facebook.com/cityofplanotx](https://www.facebook.com/cityofplanotx).

To speak at the meeting, register at Plano.gov/SpeakerRegistration. Online registration opens at 5:00 p.m. on the Wednesday prior to the meeting and **closes at 4:00 p.m.** on the day of the meeting. **ONSITE REGISTRATION IS NOT AVAILABLE.**

Emails regarding agenda items and other comments on City business may be submitted to: councilcomments@plano.gov.

AGENDA

	<u>Presenter</u>	<u>Page #</u>
I. Call to Order	Mayor	
II. Request for Public Input on Budget & CIP	Council	
III. Budget Work Session Overview	Israelson	
IV. Council Items and Issues for Discussion	Council	
V. Grant Funding Requests		
A. Presentation of Heritage Commission	Baldwin	3
B. Presentation of Buffington Community Service Grants	Tseng	22
C. Presentation of Cultural Arts Commission	Goebel	32
D. Public Impr. District Discussion-Funding Request	Hawkins/Shea	52
VI. Operating Budget		
A. Update Five-Year Financial Forecast	Garrett/Rhodes-Whitley	63
B. Revenues		
1. Ad Valorem Tax Base	Rhodes-Whitley	73
2. Tax Rate	Rhodes-Whitley	76
a. No-New Revenue Rate		
b. Voter Approved Rate		

	3. Sales Tax	Rhodes-Whitley	78
	4. Water & Sewer Rate Increase	Garrett/Rhodes-Whitley	83
	5. Environmental Waste Services Rate Increase	Owens	91
	6. Municipal Drainage Rate Increase	Rhodes-Whitley	98
	a. Stream Bank Stabilization Program	Thornhill	94
VII.	Program Changes		
	A. Comp Plan Adjustments/Wage Tool	Huynh	100
	B. Health Plan Update	Huynh	106
	C. Cost Recovery Update	Siemer	109
VIII.	Community Investment Program	Israelson/Rhodes-Whitley	119
IX.	Proposed Ad Valorem Tax Rate	Israelson/Rhodes-Whitley	
X.	Executive Session		

In accordance with Vernon's Texas Codes Annotated, Government Code, Chapter 551, Open Meetings Act:

a) Economic Development (Section 551.087)

Discuss a financial offer or other incentive to a business prospect to locate, stay, or expand in Plano and consider any commercial and financial information from the business prospect.

XI. Adjourn

The City of Plano encourages participation from all citizens. The Plano Municipal Center has accessible restroom facilities, drinking fountains, and power assist entrance doors. The facility is easily accessed from public sidewalks and parking areas. Designated accessible parking is available on the north and south sides of the building. The Senator Florence Shapiro Council Chambers is accessible by elevator to the lower level. If you require additional assistance or reasonable accommodations under the Americans with Disabilities Act for this meeting or facility including ASL interpreters, you should submit an ADA Reasonable Accommodation Request Form to the ADA Coordinator at least 48 hours in advance. If you need assistance completing the form, please call 972-941-7152. Complete or download the ADA Reasonable Accommodation Request Form at <https://www.plano.gov/395/Accessibility-Accommodations>.

Date: August 8, 2025

To: Mark D. Israelson, ICMA-CM, City Manager
Jack Carr, P.E., Deputy City Manager

From: Drew Brawner, AICP, Comprehensive Planning Manager

Subject: Summary of Fiscal Year 2025–2026 Heritage Preservation Grant Program Recommendations

The Heritage Commission would like to thank the City Council for the opportunity to provide input and make recommendations for the Heritage Preservation Grants Program. For Fiscal Year (FY) 2025–26, an estimated total of \$1,500,000 is available for the Heritage Preservation Grant Program, funded through the city’s hotel/motel tax collections.

At its March 26, 2025, meeting, the Heritage Commission provided direction to update the grant program structure to expand eligibility and better align funding with preservation and heritage tourism goals, consistent with direction from the City Council last year.

The FY2025–26 Heritage Grants are now distributed across four categories:

1. **Major Heritage Grant:** Supports substantial preservation projects/programs and requires quarterly reporting.
2. **Minor Heritage Grant:** Offers up to \$2,500 for small-scale initiatives by tax-exempt nonprofit organizations.
3. **Downtown Events Heritage Grant:** Supports community-led heritage events held in Historic Downtown.
4. **Emergency Heritage Grant Fund:** Reserved for urgent, unforeseen damage to designated heritage resources caused by natural disasters. Available year-round until funds are exhausted.

Five applications for Major Heritage Grant funds and three applications for Downtown Events Heritage Grant funds were received, which are listed in the tables below:

Major Heritage Grant Applicants	Grant Request
Heritage Farmstead Museum	\$ 690,000
The Plano Conservancy for Historic Preservation, Inc.	\$ 230,902
Texas Pool Foundation	\$ 74,400
North Texas Masonic Historical Museum & Library	\$ 74,888
The Plano African American Museum	\$ 23,136
Total	\$ 1,093,326

The Heritage Farmstead Museum (Farmstead), The Plano Conservancy for Historic Preservation, Inc. (Conservancy), The Texas Pool Foundation (Texas Pool), North Texas Masonic Historical Museum & Library (Masonic Library), and Plano African American Museum (African American Museum) are all returning applicants that received heritage grant funds for fiscal year 2024–25.

The Farmstead and Conservancy have both requested the previously established set-aside amounts for operation and maintenance (O/M) costs, set at \$330,000 and \$145,000, respectively. In addition, all organizations (including the Farmstead and Conservancy) can request funds to cover eligible Administrative Costs. Administrative Cost requests must clearly articulate their value in supporting Heritage Tourism projects. Eligible expenses include salaries, utilities, property insurance, and other indirect program costs, and these costs are capped at a maximum of 20% of each requested heritage project. Administrative costs cannot be requested without a corresponding heritage project request.

Downtown Events Heritage Grant Applicants	Grant Request
Plano International Festival Corporation	\$ 33,850
Celebrating Asian American Heritage Foundation	\$ 7,738
Museum of Contemporary Visual Art	\$ 11,500
Total	\$ 53,088

While the Plano International Festival Corporation (International Festival) and Celebrating Asian American Heritage Foundation (AsiaFest) have previously received Arts & Events grant funds through the Cultural Arts Commission, this grant cycle was the first time that the requests for these downtown events were considered under the Heritage Grant Program and reviewed by the Heritage Commission. In addition, the Museum of Contemporary Visual Art (MOCVA) requested funds for the first time.

Heritage Commission Recommendations

The Heritage Commission considered the FY2025–26 grant requests at their July 23, 2025, regular meeting. After discussion and deliberation, the Heritage Commission recommended to fully fund all requested grant projects except for the application submitted by the Museum of Contemporary Visual Art (MOCVA). The Commission did not recommend funding for MOCVA because the request was not for a self-produced event and the applicant already requested and was recommended for funding through the Cultural Arts Commission. A summary of the grant funding recommendations for each applicant is provided below:

Museum of Contemporary Visual Art:

Heritage Grant Applicant	Requested Grant	Recommended Grant
Museum of Contemporary Visual Art	\$ 11,500	\$ 0

First-time applicant MOCVA submitted a request for funding for the Children’s Corner at the Plano International Festival. However, the Heritage Commission did not recommend funding the request. As part of the Plano International Festival, the request is not for a self-produced event but rather a component of a larger festival requesting funding through a separate grant request submitted by the Plano International Festival Foundation. MOCVA has been recommended for FY2025–26 funding through the Cultural Arts Commission’s Arts and Events Grant for general arts organization expenditures.

Heritage Farmstead Museum:

Heritage Grant Applicant	Requested Grant	Recommended Grant
Heritage Farmstead Museum	\$ 690,000	\$ 690,000

The Farmstead requested grant funding for four heritage projects —Marketing, Special Events, Site Improvements (Phase II), and Ammie Wilson House Fire Protection—as well as associated administrative costs. The Heritage Commission recommended full funding for all four heritage projects and the requested administrative costs, totaling \$360,000. In total, the Farmstead will receive \$690,000 in funding, including the \$330,000 set-aside for operation and maintenance (O/M) costs, which do not require a recommendation from the Heritage Commission.

The Plano Conservancy for Historic Preservation:

Heritage Grant Applicant	Requested Grant	Recommended Grant
The Plano Conservancy for Historic Preservation, Inc.	\$ 230,902	\$ 230,902

The Conservancy requested funding for five heritage projects—Archaeology Fair, Cemeteries Restoration, Museum Updates, Marketing, and Education—as well as the associated administrative costs. The Heritage Commission recommended full funding for all five heritage projects and the requested administrative costs, totaling \$85,902. In total, the Conservancy will receive \$230,902 in funding, including the \$145,000 set-aside for operation and maintenance (O/M) costs, which do not require a recommendation from the Heritage Commission.

Texas Pool Foundation:

Heritage Grant Applicant	Requested Grant	Recommended Grant
Texas Pool Foundation	\$ 74,400	\$ 74,400

The Texas Pool requested funding for three heritage projects—Marketing, Educational Programs and Events, and the Roof Project—as well as associated administrative costs. The Heritage Commission recommended full funding for all three heritage projects and the requested administrative costs, totaling \$74,400.

North Texas Masonic Historical Museum and Library:

Heritage Grant Applicant	Requested Grant	Recommended Grant
North Texas Masonic Historical Museum & Library	\$ 74,888	\$ 74,888

The Masonic Library requested funding for three heritage projects—Moore House West Wall Door/Windows Repair, Moore House West Wall Stucco/Brick Repair, and Masonic Sections of Plano Mutual Cemetery Restoration—as well as associated administrative costs. The Heritage Commission recommended full funding for all three heritage projects and the requested administrative costs, totaling \$74,888.

Plano African American Museum:

Heritage Grant Applicant	Requested Grant	Recommended Grant
Plano African American Museum	\$ 23,136	\$ 23,136

The African American Museum requested funding for six heritage projects—Urban Music Festival, When Food Speaks Event, Summer Program, Well Restoration Project, Informational Sign, and Black History Month—as well as associated administrative costs. The Heritage Commission recommended full funding for all six heritage projects and the requested administrative costs, totaling \$23,136.

Plano International Festival Corporation:

Heritage Grant Applicant	Requested Grant	Recommended Grant
Plano International Festival Corporation	\$ 33,850	\$ 33,850

The Plano International Festival Corporation requested funding for the Plano International Festival event. The Heritage Commission recommended \$33,850 for this Downtown Event scheduled for October 18, 2025.

Celebrating Asian American Heritage Foundation:

Heritage Grant Applicant	Requested Grant	Recommended Grant
Celebrating Asian American Heritage Foundation	\$ 7,738	\$ 7,738

The Celebrating Asian American Heritage Foundation requested funding for the Plano AsiaFest event. The Heritage Commission recommended \$7,738 for this Downtown Event scheduled for May 2, 2026.

Grant Fund Balance

Since the total grant funding recommendation is less than the estimated \$1,500,000 available for the Heritage Preservation Grants Program, the Commission recommends utilizing the remaining heritage grant fund balance of \$365,086 as follows: \$22,500 for the Emergency Heritage Grant Fund (EHGF) and \$342,586 for city-initiated Heritage Preservation program-related projects. Eligible city-initiated projects for this fiscal year will be considered by the Heritage Commission for recommendation to the City Council at a future meeting.

Remaining Grant Funds	Recommended Amount
Emergency Heritage Grant Funds (EHGF)	\$ 22,500
City-initiated Heritage Preservation Program-related Projects	\$ 342,586
Total	\$ 365,086

Summary

As detailed in the attached table, the Heritage Commission is recommending awarding a total of \$1,134,914 for the FY 2025–2026 Heritage Preservation Grant Program, with the remaining \$365,086 allocated for the Emergency Heritage Grant Fund and city-initiated Heritage Preservation program-related projects. The Commission appreciates the opportunity for involvement with the Heritage Grant Program evaluation process.

cc: Christina Day, AICP, Director of Planning
Raha Poladi, AICP, Lead Planner
Bhavesh Mittal, Heritage Preservation Officer

Attachment:

Summary of Heritage Preservation Grant Recommendations for Fiscal Year 2025–2026

**SUMMARY OF HERITAGE PRESERVATION GRANT RECOMMENDATIONS FOR
FISCAL YEAR 2025–2026**

Organization	Projects Requested	Amount Requested	Amount Recommended
MAJOR HERITAGE GRANT (MaHG)			
Heritage Farmstead Museum	Marketing	\$ 40,000	\$ 40,000
	Special Events	\$ 50,000	\$ 50,000
	Site Improvements – Phase II	\$ 150,000	\$ 150,000
	Ammie Wilson House Fire Protection	\$ 60,000	\$ 60,000
	Administrative Costs	\$ 60,000	\$ 60,000
	Total Grant Request	\$ 360,000	\$ 360,000
	Operations & Maintenance (O/M) Set-Aside	\$ 330,000	\$ 330,000
	TOTAL FUNDING	\$ 690,000	\$ 690,000
The Plano Conservancy for Historic Preservation, Inc.	Archaeology Fair	\$ 10,000	\$ 10,000
	Cemeteries	\$ 43,615	\$ 43,615
	Museum	\$ 5,465	\$ 5,465
	Marketing	\$ 5,666	\$ 5,666
	Education	\$ 6,839	\$ 6,839
	Administrative Costs	\$ 14,317	\$ 14,317
	Total Grant Request	\$ 85,902	\$ 85,902
	Operations & Maintenance (O/M) Set-Aside	\$ 145,000	\$ 145,000
	TOTAL FUNDING	\$ 230,902	\$ 230,902
Texas Pool Foundation	Roof Project	\$ 45,000	\$ 45,000
	Educational Programs and Events	\$ 7,000	\$ 7,000
	Marketing	\$ 10,000	\$ 10,000
	Administrative Costs	\$ 12,400	\$ 12,400
	TOTAL	\$ 74,400	\$ 74,400
North Texas Masonic Historical Museum & Library	Plano Mutual Cemetery, Masonic	\$ 7,534	\$ 7,534
	Moore House West Wall Doors/Windows	\$ 42,823	\$ 42,823
	Moore House West Wall Stucco	\$ 15,000	\$ 15,000
	Administrative Costs	\$ 9,531	\$ 9,531
	TOTAL	\$ 74,888	\$ 74,888
Plano African American Museum	Urban Music Festival	\$ 6,000	\$ 6,000
	When Food Speaks	\$ 5,000	\$ 5,000
	Summer Program	\$ 2,000	\$ 2,000
	Well Restoration	\$ 850	\$ 850
	Informational Sign	\$ 2,430	\$ 2,430
	Black History Month	\$ 3,000	\$ 3,000
	Administrative Costs	\$ 3,856	\$ 3,856
	TOTAL	\$ 23,136	\$ 23,136
MaHG TOTAL FUNDING REQUESTS		\$ 1,093,326	\$ 1,093,326

Organization	Projects Requested	Amount Requested	Amount Recommended
DOWNTOWN EVENTS HERITAGE GRANT (DEHG)			
Plano International Festival Corporation	Plano International Festival	\$ 33,850	\$ 33,850
Celebrating Asian American Heritage Foundation	Plano AsiaFest	\$ 7,738	\$ 7,738
Museum of Contemporary Visual Art	Children's Corner at Plano International Festival	\$ 11,500	\$ 0
DEHG TOTAL FUNDING REQUESTS		\$ 53,088	\$ 41,588
EMERGENCY HERITAGE GRANT FUNDS (EHGF)		\$ 22,500	\$ 22,500
CITY-INITIATED HERITAGE PRESERVATION PROJECTS		\$ 331,086	\$ 342,586
TOTAL – HERITAGE PRESERVATION GRANT FUNDS		\$ 1,500,000	\$ 1,500,000

* The grant funding for the Administrative Costs (AC) is limited to 20% of the total requested Heritage Projects.



FY 2025-26 HERITAGE PRESERVATION GRANT RECOMMENDATIONS AUGUST 14, 2025

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HERITAGE COMMISSION

Nancy Baldwin, Chair
Nayyer Ale-Rasool, Vice Chair
Debbie Barrios
Michael Holland
David Kratochvil
Carole Greisdorf
Tim Bob



Heritage Commission Members

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2024-25 Major Accomplishments



- 2024 Heritage Preservation Plan update
- Heritage Preservation Grant Program Update
- The Plano Development History Project received the 2025 Celebrating Leadership in Development Excellence (CLIDE) Award from the North Central Texas Council of Governments

FY 2024-2025 Major Accomplishments

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Certificates of Appropriateness



- Issued after the review of development proposals involving historic buildings.
- Ensures proposed improvements are consistent with design standards and protect the historic integrity of the structure and the district.

Certificate of Appropriateness Figures



CAs ISSUED
IN 2024

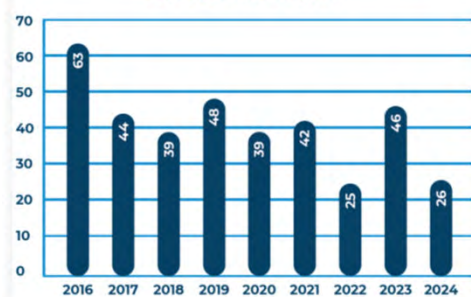


CAs APPROVED
AT STAFF LEVEL



STAFF LEVEL
APPROVALS IN
A DAY OR LESS

Certificate of Appropriateness (CA) Applications Received
2016-2024 calendar years



FY 2025-26 Heritage Preservation Grants

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Commission Training



Jun. 2025 - National Alliance of Preservation Commission *Virtual Training*

May 2025 - National Alliance of Preservation Commission *Virtual Training*

Apr. 2025 - National Alliance of Preservation Commission *Virtual Training*

Mar. 2025 - National Alliance of Preservation Commission *Virtual Training*

Feb. 2025 - National Alliance of Preservation Commission *Virtual Training*

Jan. 2025 - National Alliance of Preservation Commission *Virtual Training*

Dec. 2024 - National Alliance of Preservation Commission *Virtual Training*



FY 2025-26 Heritage Preservation Grants

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Heritage Preservation Grants – Criteria



Goal

To preserve and promote the City of Plano's heritage thereby supporting and stimulating local business and strengthening the culture, prosperity and welfare of Plano's citizens.

Criteria

- Heritage Tourism/Public Education – 50%
- Heritage Preservation Merit – 25%
- Administrative & Fiscal Responsibility – 25%



FY 2025-26 Heritage Preservation Grants

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Heritage Preservation Grants – Process & Timeline



April 1, 2025	Grants open online with ZoomGrants
April 9, 2025	Grants workshop
May 5, 2025	Grant applications due in ZoomGrants
June 25, 2025	Grant applicant presentation & Heritage Commission deliberation
Aug. 14, 2025	Grant recommendations presentation to City Council
Sep. 2025	City Council approves budget & contracts
Oct. 1, 2025	Grant cycle begins
Oct. (first week)	Grant funding agreement execution
Sep. 30, 2026	Grant cycle ends

FY 2025-26 Heritage Preservation Grants

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FY 2025-2026 Grant Program Changes



The Heritage Grants are now distributed across four categories:

- 1. Major Heritage Grant (MaHG):** Supports substantial preservation projects/programs and requires quarterly reporting.
- 2. Minor Heritage Grant (MiHG):** Offers up to \$2,500 for small-scale initiatives by tax-exempt nonprofit organizations.
- 3. Downtown Events Heritage Grant (DEHG):** Supports community-led heritage events held in Historic Downtown.
- 4. Emergency Heritage Grant Fund:** Reserved for urgent, unforeseen damage to designated heritage resources caused by natural disasters. Available year-round until funds are exhausted.

FY 2025-26 Heritage Preservation Grants

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Heritage Preservation Grants – Operations & Maintenance



Heritage Farmstead Museum



The Plano Conservancy for Historic Preservation

FY 2025-26 Heritage Preservation Grants

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FY 2025-2026 Grant Funding Requests



Grant Category	Organization	Grant Funding Request
MaHG	Heritage Farmstead Museum	\$690,000
MaHG	The Plano Conservancy for Historic Preservation, Inc.	\$230,902
MaHG	The Texas Pool Foundation	\$74,400
MaHG	North Texas Masonic Historical Museum & Library	\$74,888
MaHG	Plano African American Museum	\$23,136
TOTAL MaHG FUNDS REQUESTED		\$1,093,326
DEHG	Plano International Festival Corporation	\$33,850
DEHG	Celebrating Asian American Heritage Foundation	\$7,738
DEHG	Museum of Contemporary Visual Art	\$11,500
TOTAL DEHG FUNDS REQUESTED		\$53,088
TOTAL HERITAGE GRANT FUNDS REQUESTED		\$1,146,414

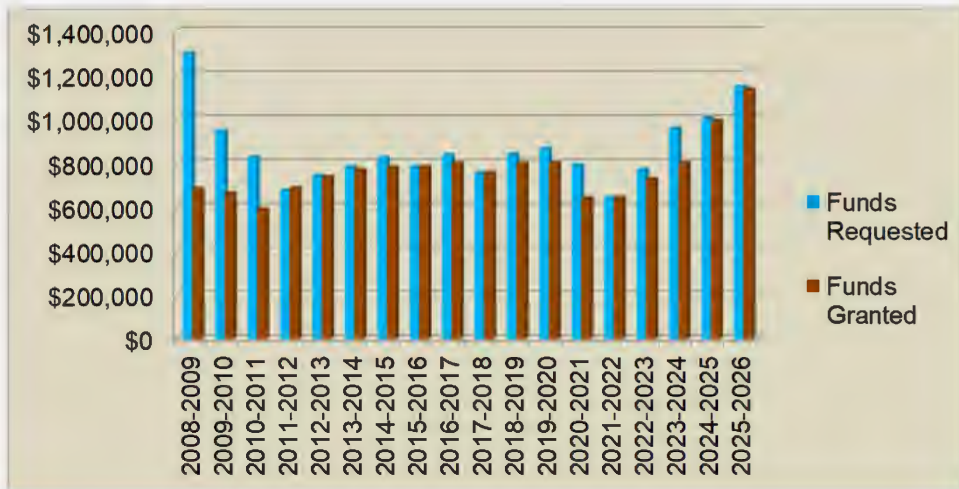
Estimated Heritage grant funds available - **\$1,500,000**

FY 2025-26 Heritage Preservation Grants

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Heritage Preservation Grant – Recent History



FY 2025-26 Heritage Preservation Grants

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Heritage Farmstead Museum



Projects/Programs

1. Operations & Maintenance (O&M)
Set-Aside - \$330,000
2. Marketing
3. Special Events
4. Site Improvements – Phase II
5. Ammie Wilson House Fire Protection
6. Administrative Costs

Requested Funding **\$360,000**

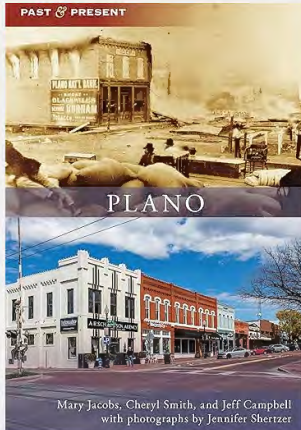
**Recommended Funding
including the set-aside
\$330,000 for O&M** **\$690,000**

FY 2025-26 – Major Heritage Grant (MaHG) Applicants

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The Plano Conservancy for Historic Preservation



Projects/Programs

1. Operations & Maintenance (O&M)
Set-Aside - \$145,000
2. Archaeology Fair
3. Cemeteries
4. Museum
5. Marketing
6. Education
7. Administrative Costs

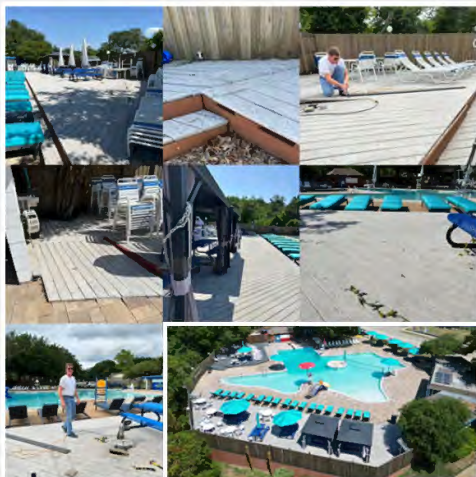
Requested Funding	\$85,902
Recommended Funding including the set-aside \$145,000 for O&M	\$230,902

FY 2025-26 – Major Heritage Grant (MaHG) Applicants

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The Texas Pool Foundation



Projects/Programs

1. Roof Project
2. Educational Programs and Events
3. Marketing
4. Administrative Costs

Requested Funding	\$74,400
Recommended Funding	\$74,400

FY 2025-26 – Major Heritage Grant (MaHG) Applicants

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North Texas Masonic Historical Museum & Library



Projects/Programs

1. Plano Mutual Cemetery
2. Moore House West Façade Doors/Windows Replacement
3. Moore House West Wall Stucco/Brick Repair
4. Administrative Costs

Requested Funding **\$74,888**

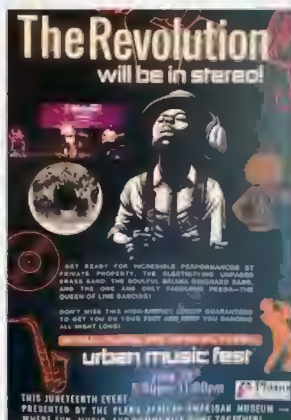
Recommended Funding **\$74,888**

FY 2025-26 – Major Heritage Grant (MaHG) Applicants

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Plano African American Museum



Projects/Programs

1. Urban Music Festival
2. When Food Speaks
3. Summer Program
4. Well Restoration
5. Informational Sign
6. Black History Month
7. Administrative Costs

Requested Funding **\$23,136**

Recommended Funding **\$23,136**

FY 2025-26 – Major Heritage Grant (MaHG) Applicants

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Plano International Festival Corporation



Downtown Event

Plano International Festival

Requested Funding	\$33,850
Recommended Funding	\$33,850

FY 2025-26 – Downtown Events Heritage Grant (DEHG) Applicants

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Celebrating Asian American Heritage Foundation



Downtown Event

Plano AsiaFest

Requested Funding	\$7,738
Recommended Funding	\$7,738

FY 2025-26 – Downtown Events Heritage Grant (DEHG) Applicants

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Museum of Contemporary Visual Art



Downtown Event

Children's Corner at the Plano International Festival

Requested Funding \$11,500
Recommended Funding \$0

FY 2025-26 – Downtown Downtown Events Heritage Grant (DEHG) Applicants

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FY 2025-2026 Heritage Grant – MaHG & DEHG Funding Recommendations



Organization	Funds Requested	Funds Recommended
Heritage Farmstead Museum	\$690,000	\$690,000
The Plano Conservancy for Historic Preservation, Inc.	\$230,902	\$230,902
The Texas Pool Foundation	\$74,400	\$74,400
North Texas Masonic Historical Museum & Library	\$74,888	\$74,888
Plano African American Museum	\$23,136	\$23,136
TOTAL MaHG FUNDS	\$1,093,326	\$1,093,326
Plano International Festival Corporation	\$33,850	\$33,850
Celebrating Asian American Heritage Foundation	\$7,738	\$7,738
Museum of Contemporary Visual Art	\$11,500	\$0
TOTAL DEHG FUNDS	\$53,088	\$41,588
TOTAL	\$1,146,414	\$1,134,914

FY 2025-26 Heritage Preservation Grants

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FY 2025-2026 Heritage Grant – Balance Funds



Total Available Grant Funds	\$1,500,000
Recommended Grant Funds for Five MaHG Applicants	\$1,093,326
Recommended Grant Funds for Three DEHG Applicants	\$41,588
Remaining Grant Funds	\$365,086

FY 2025-26 Heritage Preservation Grants

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FY 2025-2026 Heritage Grant – Balance Fund Recommendations



Remaining Grant Funds	Recommended Amount
Emergency Heritage Grant Funds (EHGF)	\$ 22,500
City-initiated Heritage Preservation Program-related Projects	\$ 342,586
Total	\$ 365,086

FY 2025-26 Heritage Preservation Grants

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QUESTIONS



THANK YOU

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Date: August 4, 2025

To: Mark Israelson, City Manager

From: Curtis Howard, Director of Neighborhood

Subject: FY 2025-2026 Buffington Community Services Grant Recommendations

Background

The Plano City Council established a Community Services Grant in 1998 to address the community's social service needs. The grant utilized general funds to support programs that provide short-term, urgent economic assistance or care services, as well as offer immediate relief of a crisis impacting the physical and/or mental health of Plano residents. In 2006, the Community Service Grant was renamed to the Buffington Community Services Grant (BCSG) in honor of the former Community Services Manager, Robert W. Buffington's thirty years of service to Plano, primarily in the field of Community Development.

The City of Plano uses a consolidated grant process to allocate Buffington Community Service Grant (BCSG) funds. As mentioned previously, HUD funds come from the federal government. BCSG funds are appropriated by City Council at \$2 per capita. BCSG funds provides public service activities directly to Plano residents with special consideration given to those agencies offering:

- Short-term, urgent economic assistance, or care services; or
- Immediate relief of crisis impacting the physical and/or mental health of Plano residents.

During the month of April 2025, the CRC held four public meetings to consider agency requests for 2025 BCSG, CDBG and HOME funding available to the City of Plano. On April 22, 2025, the Commission held a public hearing to determine agency funding recommendations. Twenty-eight requests, in the amount of \$2,659,741, were considered during the Consolidated Grant process. Five requests were recommended by the Commission for CDBG and HOME funds, and ninety requests were recommended for BCSG funds. The Commission approved these recommendations in a vote of 9-0-0.

Funding Recommendations

The Community Services Division expects to have a total of \$599,178 in city general funds to be allocated for FY 2025-26. The Community Relations Commission has recommended the below programs to receive BCSG funding:

Agency	2025 CRC Recommended Funding	2024 Agency Funding
Agape Resource and Assistance Center	\$40,000	\$50,000
The Agape Resource and Assistance Center provides transitional housing and empowerment support to single homeless women and women with children.		

Agency	2025 CRC Recommended Funding	2024 Agency Funding
All Community Outreach	\$5,000	\$0
All Community Outreach's Emergency Financial Assistance Program will help stabilize Plano households by providing one-time emergency rental assistance to Plano residents experiencing financial hardship.		
Assistance League of Greater Collin County	\$7,500	\$15,000
The Assistance League of Greater Collin County manages the "Operation School Bell" program, which provides high-quality, new clothing, and hygiene kits to Plano ISD elementary school children in need that are referred by school officials.		
Bella House Inc.	\$15,000	\$0
Bella House is a maternity home offering transformative services including but not limited to shelter, basic supplies, education and job search with assistance from professional case managers to pregnant women who do not have a home.		
Boys and Girls Clubs of Collin County	\$42,275	\$35,000
The Boys and Girls Clubs of Collin County provides after-school and summer programs to help low-income Plano children enhance their academic success, nutrition, character, and leadership.		
BIND: Brain Injury Network of Dallas	\$15,000	\$21,264
BIND: Brain Injury Network of Dallas aids in the rehabilitative process by helping individuals improve their physical and mental skills to transition from medical patient to a productive community member.		
Children's Advocacy of Collin County	\$25,000	\$0
The Children's Advocacy Center strives to provide safety, healing and justice through clinical therapy services for children victimized by abuse or neglect.		
City House, Inc.	\$7,103	\$0
City House's Transitional Living Program (TLP) provides emergency and transitional residential shelter (ages 18-21) and non-residential services (ages 16-21) to homeless youth. This program was also recommended for \$31,595 in Community Development Block Grant funds; total grant funds for FY2025-26 is \$38,698.		
CommonGood Medical Clinic	\$15,000	\$0
CommonGood Medical Clinic's Primary Care programs will provide primary healthcare to uninsured individuals ages 13 to 65. Additional services include lab work and access to needed prescriptions.		
Communities in School of the Dallas Region	\$40,000	\$35,000
Communities in School of the Dallas Region provides case management and support to at-risk students who struggle in school due to poverty and/or various other factors that are beyond their control. Program locations are at Armstrong, Bowman, Carpenter, Frankford, Hendrick, Otto, Renner, and Wilson Middle Schools; Clark, McMillen, Shepton, Vines, and Williams High Schools; Plano East and Plano West Senior High School.		
Court Appointed Special Advocates of Collin County, Inc.	\$40,000	\$35,000
Court Appointed Special Advocates (CASA) of Collin County serves abused and neglected children removed by emergency court order by serving as the guardian ad litem for children.		

Agency	2025 CRC Recommended Funding	2024 Agency Funding
Family Compass	\$35,000	\$45,000
Family Compass provides voluntary services to address economic insecurity and the prevention of child abuse.		
Family Gateway	\$20,000	\$0
Family Gateway will provide Assessment and Diversion services to Plano families with children ages 0 to 17 who are literally or imminently homeless. Services include short hotel stays while housing is found, deposits, risk fees and rental assistance, as needed.		
Grace to Grow dba Grace to Change	\$12,500	\$17,500
Grace to Grow provides comprehensive, out-patient substance abuse treatment to adolescents.		
Hope Restored Mission	\$42,300	\$36,712
Hope Restored Mission provides unhoused and housed, low-income individuals/families with case management services, food and clothing, mail/messaging center services, procurement of identification cards, and access to housing assistance.		
Hope's Door New Beginnings	\$20,000	\$0
Hope's Door New Beginnings provides emergency and transitional shelter to women and their children that have survived domestic violence.		
Jewish Family Service	\$40,000	\$35,000
Jewish Family Service provides supportive services to frail older adults and assists them in maintaining their independence in their homes through their Older Adults program.		
Maurice Barnett Geriatric Wellness Center	\$30,000	\$25,000
The Maurice Barnett Geriatric Wellness Center provides a Preventive Health Care Program seniors and severely disabled Plano residents with essential health care to which they may not have access due to financial restraints.		
Meals on Wheels of Collin County	\$50,000	\$60,000
Meals on Wheels of Collin County Senior Food Program provides home delivered meals to home bound nutritionally at-risk seniors who are unable to prepare their own meals.		
My Possibilities	\$40,000	\$55,120
My Possibilities provides speech therapy, music therapy, counseling, and behavior therapy to adults with intellectual or developmental disabilities (IDD), learning differences, traumatic brain injury, and other cognitive disorders.		
Rainbows Days, Inc.	\$7,500	\$17,500
The Rainbow Days provides shelter-based social-emotional learning support groups for homeless children.		
Rape Crisis Center of Collin County dba The Turning Point	\$50,000	\$50,059
The Turning Point provides counseling, education, and support to those impacted by sexual assault, harassment, or abuse.		

Next Steps

If the recommendations are accepted, the City Manager will include the recommended agency amounts in the FY 2025-26 Budget.

xc: Sam Greif, Deputy City Manager
Shanette Eaden, Housing and Community Services Manager
Karen Davis, Cultural Arts Grant Administrator



Plano

City of Excellence



Community Relations Commission Report

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Community Relations Commission Report

2025 Buffington Community Services Grant Recommendations

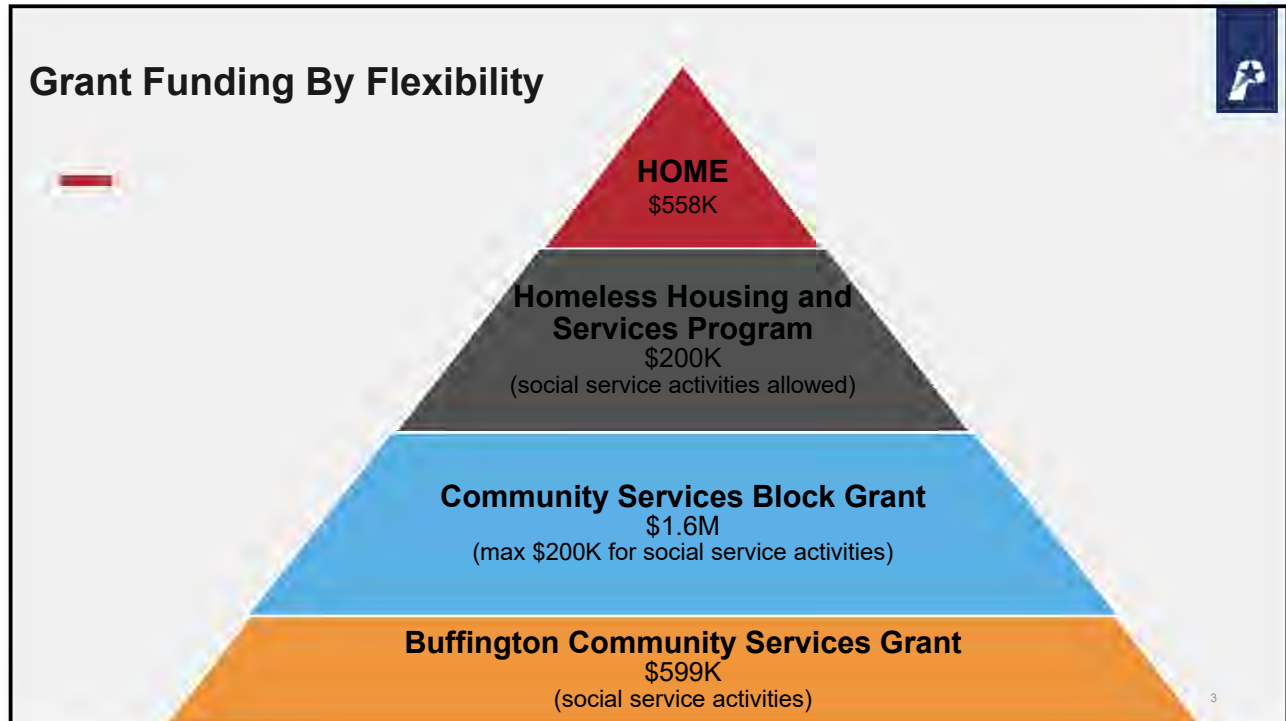


Curtis Howard, Director of Neighborhood Services

2

2

Grant Funding By Flexibility



3

Neighborhood Services Grant Funding

Neighborhood Services Grant Funding		
State Grants	Federal Grants	Community Services Grants
*Recommended by the Community Relations Commission	*Recommended by the Community Relations Commission	*Recommended by the Community Relations Commission
June 24 th Meeting	July 28 th Meeting	August 14 th Meeting
<ul style="list-style-type: none"> ➤ Funded through the Texas Department of Housing and Community Affairs (TDHCA) ➤ Homeless Housing and Services Program (HHSP) ➤ Allocated through a RFP in 2022 ➤ Funds the City Rapid Rehousing Program administered by the Salvation Army 	<ul style="list-style-type: none"> ➤ Funded through HUD ➤ Community Development Block Grant (CDBG) & HOME Investment Partnerships (HOME) ➤ Allocated through the Nonprofit Consolidated Grant Application process ➤ Funds programs administered by the City and nonprofit partners 	<ul style="list-style-type: none"> ➤ Funded through the City ➤ Buffington Community Services Grant (BCSG) ➤ Allocated through the Nonprofit Consolidated Grant Application process ➤ Funds programs administered by nonprofit partners

Community Relations Commission Report

4

Community Relations Commission Report

2025 Buffington Community Services Grant Recommendations

Johnny Tseng, Chair, Community Relations Commission

5

5

Community Relations Commission Members

- Johnny Tseng (Chair)
- Semida Voicu (Vice-Chair)
- Priscilla Brown
- Magesh Kandavadivel
- Rick Grady
- Khalid Ishaq
- Misty Jackson-Miller
- Jeanna Davis
- Sandi Morse

Community Relations Commission Report

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Community Relations Commission & Consolidated Grant Application Process



- Grants are available to Nonprofit Organizations that have been in operation for a minimum of three years
- Applicants may submit up to two applications, consisting of:
 - One Program Support; and/or
 - One Housing/Site Improvement
- CRC recommendations consider:
 - Community Need based on the Five-Year Consolidated Plan; and
 - Application Evaluation Guidelines
- Source of Funds for grant funding comes from three source:
 - CDBG
 - HOME
 - BCSG

Buffington Community Services Grant (BCSG)



- This grant represents the largest amount of funding available for public service (a.k.a. social services) activities.
- The original Community Services Grants program was established in 1998 to address community social service needs.
- This program was renamed to Buffington Community Service Grants (BCSG) in 2006 to honor Robert W. Buffington's 30 years of service to Plano, primarily in Community Development.
- Funded at \$2 per Capita: FY 2025-2026 proposed budget is anticipated to be \$599,178.

BCSG Funding Eligibility

Funds must go to programs that:

- Provide public service activities directly to Plano residents with special consideration given to those agencies offering:
 - Short-term, urgent economic assistance or care services; and
 - Offer immediate relief of a crisis impacting the physical and/or mental health of Plano residents.
- Meet a Consolidated Plan Goal.

2025 Consolidated Grant Application Timeline

November 2024

- CRC convened to evaluate and approve the Consolidated Grant Application Process (e.g. Application Questions, Evaluation Guidelines, Procedures, etc.) to be utilized for the upcoming year.

January 2025

- Grant applications made available for entry and submission. City Staff provided in-person Grant Application Training to prospective grant applicants (Jan 28, Jan 29).

March 2025

- Nonprofit organizations were required to submit their grant applications by March 1.
- CRC members read and reviewed each submitted grant application (Beginning March 2).

April 2025

- Five scheduled public meetings for Nonprofit Organizations to present to the CRC and answer any questions from CRC members.
- One public hearing to discuss application funding recommendations.

June 2025

- Director of Neighborhood Services presented CRC grant recommendations to the City Council.

July 2025

- City Council reviewed and approved grant recommendations for Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) funds.

Funding Capacity Constraints



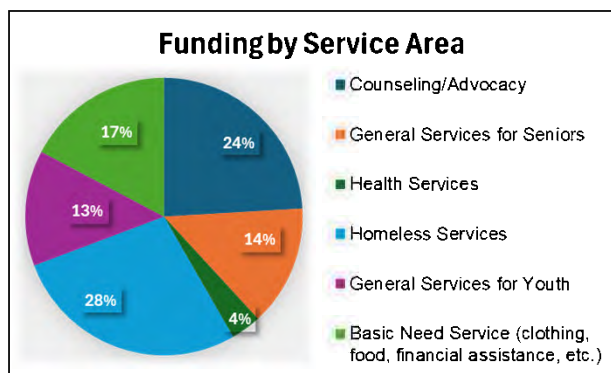
- 26 applications (\$2.65M in Total Requested Funding) reviewed.
- 24 eligible applications (\$1.81M in Total Requested Funding) competed for BCSG.



Breakdown of Funding Recommendation



Community Service Area	Funding
Counseling/Advocacy	\$205,000
General Services for Seniors	\$120,000
Health Services	\$30,000
Homeless Services	\$234,964
General Services for Youth	\$114,775
Basic Need Service (clothing, food, fin. assistance)	\$147,000
Total Public Services Funding via BCSG	\$599,178
Total Public Services Funding via CDBG	\$252,561



FY 2025-26 Consolidated Grant Application



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Thank You!

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Date: August 8, 2024

To: Mark D. Israelson, City Manager

From: Karen Davis, Cultural Arts Grants Administrator

Subject: 2025-26 Cultural Arts Commission Grant Recommendations

The Cultural Arts Commission is recommending a total award of \$1,863,851 in Cultural Arts Grants for FY 2025-26. The Commission reviewed three (3) Small Art applications, fourteen (14) Major Art applications, and two (2) Special Event applications for FY 2025-26. Of the nineteen (19) applications, eighteen (18) were recommended for funding and one (1) applicant did not receive the necessary combined Commission score of 70% to be considered for funding.

In April, the Commissioners individually reviewed the written applications and then collectively met with each applicant for their oral presentation. After completing a review of all written and oral presentations, each Commissioner scored the applicants based on their ability to draw tourists to Plano as well as their ability to develop innovative and diverse artistic events, educational programming, and community outreach programs. Each individual Commissioner's score was then combined and averaged for a total score for each applicant.

Small & Major Arts Grant Recommendations - \$1,500,000

The Small Arts grant is intended to support organizations that are in the process of obtaining their 501(c)(3) status or have recently obtained the status but have yet to complete two (2) full years of programming. All three (3) Small Grant applicants were first time applicants. The Texas Women Society scored below 70% which is not sufficient to merit a recommendation, but the remaining two (2) applicants were recommended for funding. The total recommended funding for the Small Arts applicants is \$4,386 which will leave the remaining \$1,495,614 to fund Major Arts applicants.

The Major Arts grant was created to assist 501(c)(3) arts organizations with funding their programming throughout the year. Organizations must have an active Board of Directors with either three (3) members who reside or work in Plano or have 1/3 of its members reside or work in Plano. They must also produce two-thirds of their audience-based programming within the City of Plano or provide details of why they are unable to meet the two-thirds requirement. Exceptions have been allowed due to venue limitations. All fourteen (14) applicants have previously been funded and were recommended for funding for FY 2025-26. One Major Arts recommended award was reduced to meet the requirement of no individual group receiving more than 35% of the total funding available for Major Arts.

Cultural Events Recommendations - \$363,851

The Commission received two (2) applications from non-profit organizations seeking assistance for a one day or weekend festival. Both organizations were funded in the previous year. All festivals are to take place within the City of Plano, have artistic and/or cultural relevance, and enhance tourism.

See chart below for a breakdown for the recommended funding for each applicant.

SMALL ARTS - Funded Prior to Major Arts					
Organization Name - SMALL ART	FY 24-25 Award	FY 25-26 Request	Combined Score	Award Amount by Score	No Cap
Collaborative Arts of Plano	\$ -	\$ 2,500	87.00%	\$ 2,175	
Texas Women's Society	\$ -	\$ 2,500	65.71%	\$ -	
Museum of Contemporary Visual Arts	\$ -	\$ 2,500	88.43%	\$ 2,211	
TOTAL Small Art	\$ -	\$ 7,500		\$ 4,386	

MAJOR ARTS - \$1,495,614 Remaining After Small Arts Funding - No Organization to exceed 35% of Available Funds for Major Arts					
Organization Name - Major Art	FY 24-25 Award	FY 25-26 Request or Max Allowed	Combined Commission Score	Award Amount by Score	Actual Award with Cap
North Texas Performing Arts	\$ 525,000	\$ 1,001,474	97.14%	\$ 972,832	\$ 523,465
SUBTOTAL OF 35% MAX AWARDS	\$ 525,000	\$ 1,001,474		\$ 972,832	\$ 523,465
Art & Drama Centre Theatre	\$ 130,207	\$ -		\$ -	\$ -
ArtCentre of Plano, Inc.	\$ 76,301	\$ 112,764	95.71%	\$ 107,926	\$ 98,908
Chamberlain Ballet	\$ 115,600	\$ 160,994	94.14%	\$ 151,560	\$ 138,896
Childrens Chorus of Collin County	\$ 47,624	\$ 19,940	91.86%	\$ 18,317	\$ 16,786
Dallas Asian American Youth Orchestra (DAAYO)	\$ 33,888	\$ 42,748	94.14%	\$ 40,243	\$ 36,880
Garage Arts Project	\$ 4,940	\$ 12,554	93.86%	\$ 11,783	\$ 10,799
Outcry Theatre, Inc.	\$ 55,932	\$ 68,995	93.00%	\$ 64,165	\$ 58,804
Plano Art Association	\$ 3,501	\$ 5,128	90.86%	\$ 4,659	\$ 4,270
Plano Civic Chorus	\$ 19,276	\$ 24,411	91.00%	\$ 22,214	\$ 20,358
Plano Community Band	\$ 13,344	\$ 12,979	94.71%	\$ 12,292	\$ 11,265
Plano Metropolitan Ballet	\$ 14,619	\$ 16,735	93.57%	\$ 15,659	\$ 14,350
Plano Symphony Orchestra	\$ 334,821	\$ 469,123	97.43%	\$ 457,067	\$ 418,874
Rover Drama Werks	\$ 41,068	\$ 53,545	93.57%	\$ 50,102	\$ 45,916
Town North Chapter of the Barbershop Harmony Society	\$ 2,788			\$ -	\$ -
Shine	\$ 81,091	\$ 121,917	85.96%	\$ 104,800	\$ 96,043
SUBTOTAL OF REMAINING AWARDS	\$ 975,000	\$ 1,121,833		\$ 1,060,788	\$ 972,149
TOTAL Major Art	\$ 1,500,000	\$ 2,123,307		\$ 2,033,620	\$ 1,495,614

Major Art & Small Art Combined Funding	\$ 1,500,000	\$ 2,130,807		\$ 2,038,005	\$ 1,500,000
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CULTURAL EVENTS - NO CAP					
Organization Name	FY 24-25 Award	FY 25-26 Request or Max Allowed	Combined Score	Award Amount by Score	No Cap
Plano Balloon Festival, Inc.	\$ 346,734	\$ 364,594	97.14%	\$ 354,167	
Plano Comedy Festival, Inc	\$ 8,861	\$ 11,114	87.14%	\$ 9,685	
TOTAL	\$ 355,595	\$ 375,708		\$ 363,851	

TOTAL CAC RECOMMENDED GRANT FUNDING					
	FY 24-25 Award	FY 25-26 Request or Max Allowed	Average Score	Award Amount by Score	Total Recommended
All CAC Recommended Awards	\$ 1,855,595	\$ 2,506,515	91.18%	\$2,401,857	\$ 1,863,851

The Cultural Arts Commission meets monthly to hear updates of programming and events from the funded organizations as well as to report on productions and events each Commissioner has attended. To date, the Commissioners have collectively attended over 200 productions, events, or exhibits for FY 2024-25. The Commission would like to thank the City Council for the opportunity to review and provide input for the Cultural Arts Commission grant awards.

CC: Karen Rhodes-Whitley, Director of Budget & Performance Management
Casey Srader, Assistant Director of Budget & Performance Management
Jason Gregorash, Budget CIP Manager



CULTURAL ARTS COMMISSION

2025-26 ARTS & EVENTS
GRANT FUNDING RECOMMENDATIONS



2024 - 2025 Commissioners & Staff Liaisons

COMMISSIONERS

- Diane Goebel, Chair
- Peter Wynne, Vice Chair
- Elisa Klein
- Rita Cosgrove
- Sherry Levine
- Marvallee Chen
- Toby Todd

STAFF LIAISONS

- Katie Suarez
- Karen Davis
- Senior Assistant City Attorney
- Cultural Arts Grants Administrator

2024 - 2025 Goals

- Promote innovation in arts and culture programming, education, and outreach that leads to recognition of Plano as an arts and culture destination
- Encourage new and up-and-coming arts and cultural groups to apply for grant funding
- Make recommendations to refine the grant application process that promote equity and HOT tax compliance and ensure that the City has the information needed to award Arts & Events grant funding

2024 - 2025 Accomplishments

Enhanced Efficiency and Overall Grant Experience

- Improved Commission meeting productivity
 - Introduced an educational component to support grant recipients
 - Streamlined monthly reporting to allow more time for conducting business
 - Transitioned to full Commission collaboration instead of sub-committees
- Refined eligibility language in Grant Manual for greater clarity

2024 - 2025 Accomplishments

Facilitated Promotion of Grant Funded Events

- Provided Presentation to Grant Recipients on City Marketing Capabilities
 - Increased awareness and utilization of available promotional services
- Optimized Visit Plano's promotion capabilities
 - Adopted Visit Plano's event listings for Commission use, eliminating the need for a separate calendar and reducing administrative burden on Grant Recipients

2024 - 2025 Accomplishments

Strengthened City Council Engagement

- Enhanced Communication
 - Provided regular updates to liaisons, leading to more timely feedback and greater understanding of the grant program
- Participated in Council Work Session
 - Secured approval to maintain Major Arts Grant funding maximum
 - Proposed setting aside funds for new initiatives
 - Led the revision of outdated Resolution No. 2003-2-19 (R)
 - Advocated for more arts venue space to help applicants meet grant requirement
 - Recommended a comprehensive review and revision of the grant program

2024 - 2025 Accomplishments

Contributed to Key City Initiatives

- Responded to City Manager's request to prioritize and comment on preliminary projects for 2025 Bond Referendum
 - Voiced support for proposed projects
 - Advocated for inclusion of the arts and the establishment of a centralized Cultural Arts department
- Participated in the Cultural Arts Plan Development
 - Took part in stakeholder engagement sessions, including:
 - Artists and arts organizations session
 - Cultural Arts Commission discussion session
 - Plan rollout and City public hearing



2025 - 2026 Goals

- Promote innovative arts and culture programming, education, and outreach to elevate Plano as an arts and culture destination
- Encourage emerging arts and cultural organizations to apply for grant funding

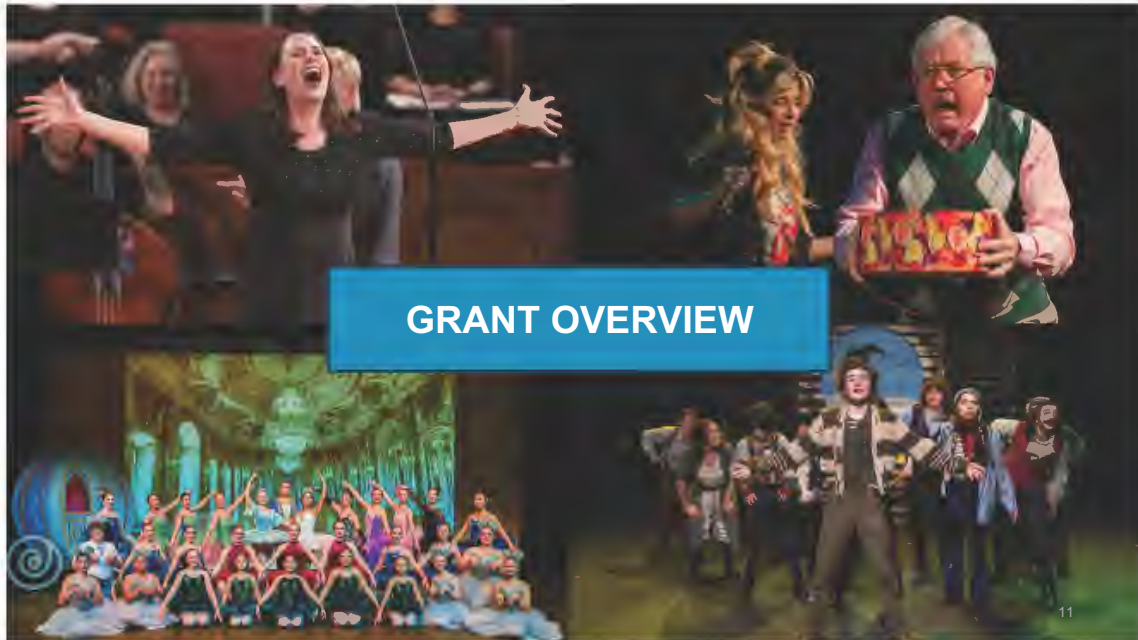
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2025 - 2026 Goals

- Support the Arts Plan Implementation
 - The Commission is committed to the Plan's success and is encouraged by the recommendation to expand our scope of authority
 - Top Priorities to Build Momentum
 - Establish Office of Creative Life, launch a citywide arts marketing strategy, improve arts facility access, and reform the grant program
 - Identify short-term actions that can provide quick wins
 - Key Concerns with Proposed Changes
 - We oppose limiting Commission appointments to only arts professionals, extending terms, and shifting grant evaluations to subcommittees—favoring a diverse, dynamic, and accountable Commission with comprehensive oversight

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Three Available Grant Types

Applicant Guidelines

Small Arts

- Award of \$2,500 or less
- 501(c)(3) Status not required for first two years of funding
- No more than four awarded per year
- Quarterly reporting of activities, attendance numbers, and allocation of City funds required

Major Arts

- Organization's funding eligibility is 25% of expenses as stated on 990 tax filing
- 501(c)(3) Status required
- Award amount is reduced to fit available funding
- Quarterly reporting of activities, attendance numbers, and allocation of City funds required

Events

- Organization's funding eligibility is 25% of expenses as stated on 990 tax filing
- 501(c)(3) Status required
- May request cash or in-kind City Services for award
- Report of activities, attendance numbers, and allocation of City funds due 60 days after event



Two-Part Application Process

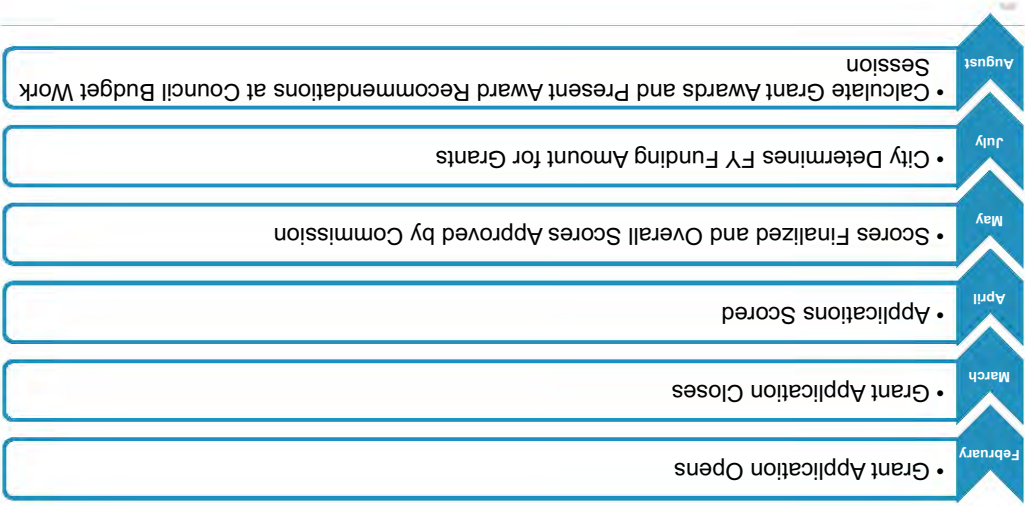
1. Written Application

- Application open from February 10 to March 24
- 12 scorable questions answered by applicant
- 8 questions answered by Grants Administrator based on performance
- Includes proposed annual budget and other organizational information
- Major Arts & Events applications provide tax-exempt documentation, IRS Form 990

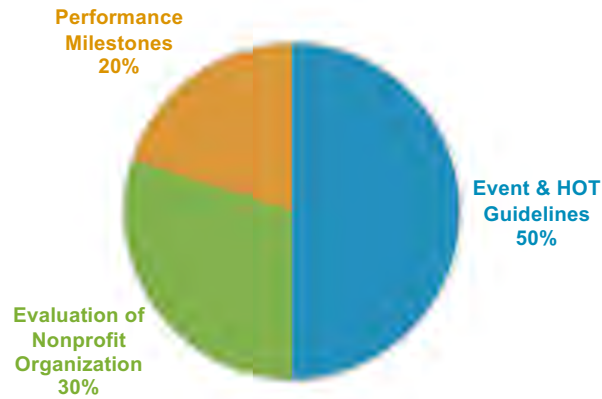
2. Oral Presentation

- 10-minute presentation to the Commission in April
- Presentation format determined by applicant
- 10-minute Commissioner Q & A period

Timeline



Application Evaluation



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Application Scoring

Maximum Score of 100 points

Commissioner scores a maximum of 80 points

Grant Administrator scores a maximum of 20 points

Combined total score of 70 points required to be funded



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Award Calculation Terms

Funding Request/Maximum Allowed – Dollar amount the applicant asks for. If request exceeds the Maximum Allowed, the Maximum Allowed will be used for calculating an award.

Applicant's Overall Score – Average of all Commissioners' individual scores.

Award by Score – Funding Request multiplied by the Applicant's Overall Score.

Total of City Provided Grant Funds – The total amount of Small & Major Arts grant funding provided by the City.

Actual Award – For Major Arts, the Award by Score is reduced proportionately for all applicants so combined awards do not exceed the Total of City Provided Grant Funds.

35% Max Award – No Major Arts award may exceed 35% of the total available funds. Any award greater than 35% will be reduced.

Award Calculation Example – Small & Special Events

- Funding Request – \$2,500
- Applicant's Overall Score – 81.57 points or 81.57%
- Award by Score – $\$2,500 \times 81.57\% = \$2,039.25$
- Actual Award – \$2,039.25

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Award Calculation Example – Major Arts

- City Provided Grant Funds – Subtract awarded Small Arts grants from City Provided Funds. Remaining amount funds Major Arts.
 - \$1,500,000 - \$4,386 = \$1,495,614 for Major Arts
- Funding Request/Maximum Allowed – \$68,995
- Applicant's Overall Score – 93 points or 93%
- Award by Score – $\$68,995 \times 93\% = \$64,165$
- Actual Award – \$58,804 – All Awards reduced proportionally to fit the \$1,495,624 of remaining funds while ensuring no award exceeds 35%.

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Small Arts Funding Overview

FY 2024-25 Actual

- No Applicants

FY 2025-26 Request

- 3 Applicants
- \$7,500 Total Request
- \$4,386 Recommended Award Total
- Available Funding for Major Arts will be Reduced by this Amount



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Major Arts Funding Overview

<u>FY 2024-25 Actual</u>	<ul style="list-style-type: none">• 16 Applicants• \$2,246,549 Total Request• \$2,124,957 Award by Score• \$1,500,000 Actual Awards
<u>FY 2025-26 Request</u>	<ul style="list-style-type: none">• 14 Applicants• \$2,123,307 Total Request• \$2,033,620 Recommended by Score• \$1,495,614 Recommended Award Total

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Special Events Funding Overview

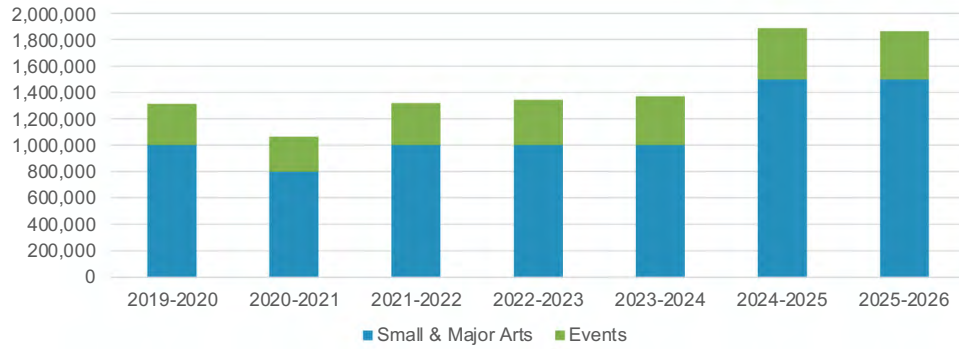
<u>FY 2024-25 Actual</u>	<ul style="list-style-type: none">• 2 Applicants• \$368,210 Total Request• \$355,595 Awarded
<u>FY 2025-26 Request</u>	<ul style="list-style-type: none">• 2 Applicants• \$375,708 Total Request• \$363,851 Recommended Total

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Historical Overview – Add 2025-2026

\$1,886,912 Recommended for 2024-2025 Arts & Events Grants

7-Year Retrospective



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Small Arts Funding Recommendation

Organization Name	FY 24-25 Award	FY 25-26 Eligible	FY 25-26 Request	Combined Score	Award Amount by Score	FY 25-26 Actual Award
Museum of Contemporary Visual Arts	\$ 2,500	\$ 2,500	\$ 2,500	88.43%	\$ 2,211	\$ 2,211
Collaborative Arts of Plano	\$ 2,500	\$ 2,500	\$ 2,500	87.00%	\$ 2,175	\$ 2,175
Texas Women's Society	\$ 2,500	\$ 2,500	\$ 2,500	65.71%	\$ -	\$ -
TOTAL Small Arts	\$ -	\$ 7,500	\$ 7,500		\$ 4,386	\$ 4,386

Major Arts Funding Recommendation

Organization Name	FY 24-25 Award	FY 25-26 Eligible	FY 25-26 Request or Max Allowed	Combined Score	Award Amount by Score	FY 25-26 Actual Award
North Texas Performing Arts	\$ 525,000	\$ 1,030,663	\$ 1,001,474	97.14%	\$ 972,832	\$ 523,465.00
SUBTOTAL OF 35% MAX AWARDS	\$ 525,000	\$ 1,030,663	\$ 1,001,474		\$ 972,832	\$ 523,465.00
Plano Symphony Orchestra	\$ 334,821	\$ 469,123	\$ 469,123	97.43%	\$ 457,067	\$ 418,874
Chamberlain Ballet	\$ 115,600	\$ 160,994	\$ 160,994	94.14%	\$ 151,660	\$ 138,896
ArtCentre of Plano, Inc.	\$ 76,301	\$ 112,889	\$ 112,764	95.71%	\$ 107,926	\$ 98,908
Shine	\$ 81,091	\$ 129,066	\$ 121,917	85.96%	\$ 104,800	\$ 96,043
Outcry Theatre, Inc.	\$ 55,932	\$ 69,764	\$ 68,995	93.00%	\$ 64,165	\$ 58,804
Rover Dramaworks	\$ 41,068	\$ 53,545	\$ 53,545	93.57%	\$ 50,102	\$ 45,916
Dallas Asian American Youth Orchestra (DAAYO)	\$ 33,888	\$ 42,748	\$ 42,748	94.14%	\$ 40,243	\$ 36,880
Plano Civic Chorus	\$ 19,276	\$ 24,411	\$ 24,411	91.00%	\$ 22,214	\$ 20,358
Childrens Chorus of Collin County	\$ 47,624	\$ 24,050	\$ 19,940	91.86%	\$ 18,317	\$ 16,786
Plano Metropolitan Ballet	\$ 14,619	\$ 16,735	\$ 16,735	93.57%	\$ 15,659	\$ 14,350
Plano Community Band	\$ 13,344	\$ 12,979	\$ 12,979	94.71%	\$ 12,292	\$ 11,265
Garage Arts Project	\$ 4,940	\$ 15,656	\$ 12,554	93.86%	\$ 11,783	\$ 10,799
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Art & Drama Centre Theatre	\$ 130,207	\$ -	\$ -		\$ -	\$ -
Town North Chapter of the Barbershop Harmony Society	\$ 2,788	\$ -	\$ -		\$ -	\$ -
SUBTOTAL OF REMAINING AWARDS	\$ 975,000	\$ 1,137,088	\$ 1,121,833		\$ 1,060,788	\$ 972,149
TOTAL Major Arts	\$ 1,500,000	\$ 2,167,751	\$ 2,123,307		\$ 2,033,620	\$ 1,495,614

Major & Small Arts Funding Recommendation

Organization Name - MAJOR ARTS	FY 24-25 Award	FY 25-26 Eligible	FY 25-26 Request or Max Allowed	Combined Commission Score	Award Amount by Score	FY 25-26 Actual Award fit to \$1.5M and 35% Max
North Texas Performing Arts	\$ 525,000	\$ 1,030,663	\$ 1,001,474	97.14%	\$ 972,832	\$ 523,465.00
SUBTOTAL OF 35% MAX AWARDS	\$ 525,000	\$ 1,030,663	\$ 1,001,474		\$ 972,832	\$ 523,465.00
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Town North Chapter of the Barbershop Harmony Society	\$ 2,788	\$ -	\$ -		\$ -	\$ -
SUBTOTAL OF REMAINING AWARDS	\$ 975,000	\$ 1,137,088	\$ 1,121,833		\$ 1,060,788	\$ 972,149
TOTAL Major Arts	\$ 1,500,000	\$ 2,167,751	\$ 2,123,307		\$ 2,033,620	\$ 1,495,614
Organization Name - SMALL ARTS	FY 24-25 Award	FY 25-26 Eligible	FY 25-26 Request	Combined Score	Award Amount by Score	FY 25-26 Actual Award
Museum of Contemporary Visual Arts		\$ 2,500	\$ 2,500	88.43%	\$ 2,211	\$ 2,211
Collaborative Arts of Plano		\$ 2,500	\$ 2,500	87.00%	\$ 2,175	\$ 2,175
Texas Women's Society		\$ 2,500	\$ 2,500	65.71%	\$ -	\$ -
TOTAL Small Arts	\$ -	\$ 7,500	\$ 7,500		\$ 4,386	\$ 4,386
Major Art & Small Art Total Funding	\$ 1,500,000				\$ 2,038,005	\$ 1,500,000



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Special Events Funding Recommendation

Organization Name	FY24-25 Award	FY 25-26 Eligible	FY 25-26 Request or Max Allowed	Combined Score	Award Amount by Score	FY 25-26 Actual Award
Plano Balloon Festival, Inc.	\$ 346,734	\$ 364,594	\$ 364,594	97.14%	\$ 354,167	\$ 354,167
Plano Comedy Festival, Inc	\$ 8,861	\$ 11,114	\$ 11,114	87.14%	\$ 9,685	\$ 9,685
Celebrating Asian American Heritage Found	\$ 4,571	\$ -	\$ -		\$ -	\$ -
Plano International Festival	\$ 26,746	\$ -	\$ -		\$ -	\$ -
TOTAL	\$ 386,912	\$ 375,708	\$ 375,708		\$ 363,851	\$ 363,851



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Summary



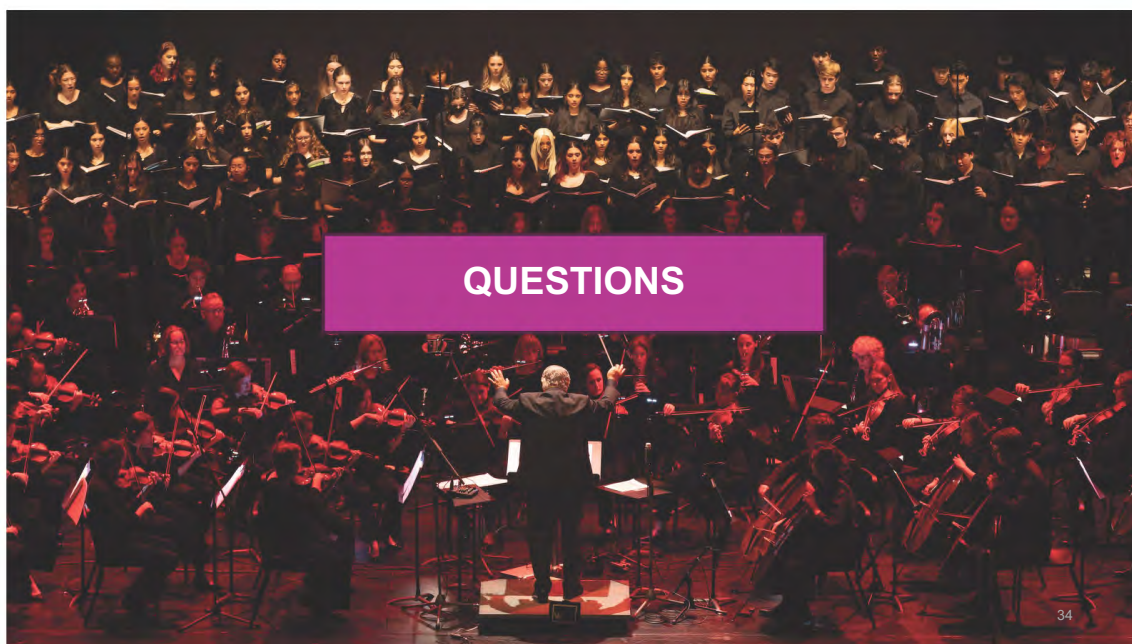
\$1.5M total recommended award to
Major and Small Arts applicants



\$363,851 total recommended award to
Events applicants



33



34



Plano
City of Excellence

Thank you

Diane Goebel, Chair
Cultural Arts Commission

City Council Budget Request – FY2025-2026

Department / Organization: Downtown Plano Public Improvement District (PID)
Presenter: Bonnie Shea – PID Chairman
Date: August 14, 2025

1. Opening & Context

As a result of the renewal of the Downtown PID in January of 2023 the amount received into the PID from the Downtown stakeholders was reduced by half from \$150,000 to \$75,000. This is a direct result of the large apartment building owners and the commercial development not renewing the PID.

2. The Need

Current Challenge: Downtown Plano is not only the historic heart of the city, but also a designated Cultural District for the State of Texas and a dedicated Arts District for the city. Because of this, Downtown needs a “stable” budget to continue to drive awareness to the district and to maintain its beauty, safety, and purpose for the city.

Why Now: Now more than ever, the PID Management committee wants to hire a contract event-coordinator to execute its plan of hosting three large, important events: Monthly art and wine walks, Night Out on 15th Street, and an Annual Mammoth Jack Festival. These events will complement the very important activities that Michelle Hawkins currently brings Downtown. Since the Collin Creek Development is approaching completion, the PID group believes the excellent execution of these events and the beautification in Downtown will “set it apart” from shiny new multi-million dollar development across the street.

3. The Request

Funding Amount: \$220,000 (After 2026 – Supplement the Mammoth Jack Festival)

Purpose: \$20,000 to replace PID budget dollars for PID consultant hired by the city; \$100,000 as the city’s annual contribution to the PID, (\$50,000 is the increase requested from the city since the PID inception in 2014 due to the increase in the value of the city property contained in the PID district); and \$100,000 for the PID to hire a contract event coordinator to execute the above-named events in Downtown

Timeframe: This would be an on-going ask from the city, as long as the PID is in effect in Downtown.

4. Expected Outcomes

Outcome	Measurement	Timeline
Continued Increase in People Downtown	KPI – Measured by PID	July 1 st - Annually
Continued Increase in Sales Tax Downtown	KPI – Measured by PID	July 1 st - Annually

5. Community Impact

Who Benefits: Property Stakeholders, the City of Plano, 100,000 people regularly

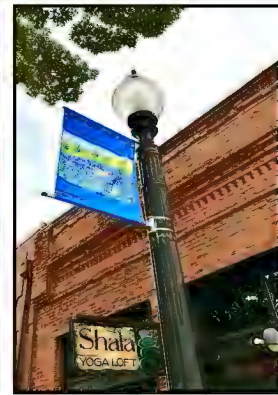
Alignment: City’s Strategic Plan for Downtown, Comprehensive Plan, and the CAP Plan

Return on Investment: Protecting Investment in Historic Downtown; Preserve Excellence

6. Accountability

Annual progress reports to Council by July1st.

With this investment, we can ensure Excellence and Economic Stability for our community — starting this year and lasting well into the future.



1

Opening & Context

PID Budget Reduced by over half at 2023 Renewal

As a result of the renewal of the Downtown PID in 2023, the amount received into the PID from the Downtown stakeholders was reduced by half from \$150,000 to \$75,000. This is a direct result of the large apartment building owners and the commercial developments in the district – not renewing the PID.

2

The Need

Current Challenge: Downtown Plano = the historic heart of the city. Because of this, Downtown needs a “stable” budget to continue to drive awareness to the district and to maintain its beauty, safety, and purpose for the city.

Why Now: Now more than ever, the PID Management Committee feels the need to hire an event coordinator to execute its plan of hosting three, signature, and defining events in Downtown: Monthly Art & Wine Walks; Night Out on 15th Street; and an Annual Mammoth Jack Festival.



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The Request

Funding Amount: \$220,000

Purpose:

\$20K - PID Consultant Fees Hired by City

\$100K - City contribution to the PID – (an increase of \$50K from inception of the PID 11 years ago)

\$100K – Contract Event Coordinator to professionally execute the signature events above: Monthly Art and Wine Walks; Annual Night Out on 15th Street; and Annual Mammoth Jack Festival



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Mammoth Jack Festival

Mammoth Jack Festival

For 2026, the event coordinator would be responsible for executing and producing a large festival like Texas Forever Fest in celebration of the Mammoth Jack, calling it Mammoth Jack Festival. Following 2026, the PID would ask the city to supplement the budget for this festival. The Downtown PID would expect an attendance of 10,000 people in its first year. The PID would like it to be arts-related and are flexible on the date, but National Donkey Day is May 8th.



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Community Impact

- Who Benefits: Property Stakeholders, increased revenues for the City of Plano, over 100K people on a regular basis
- Alignment: City's Strategic Plan for Downtown; the Comprehensive Plan; and the CAP Plan
- Return on Investment: Protection of Investment in Historic Downtown; Preservation of Excellence



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Mammoth Jack Historic Downtown Plano Brand

Why a Trade Character for Downtown Plano

In the age of short attention spans and quick impressions, memorable identities are super important. Adopting a vivid icon that quickly establishes a memorable downtown Plano brand is essential. The Mammoth Jack Plano character can fill the bill. Jack is both historical (based on Plano origin story) and is positioned to be contemporary (based on design and attitude). The result is a vivid trade character that will separate downtown Plano from all the other nearby communities competing for attention.



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Mammoth Jack Historic Downtown Plano Brand

Rationale for Mammoth Jack

In the late 1800s, Plano was positioned as a resource for high quality mule breeding, farmers and ranchers viewed Plano as a prime resource to stock their farms and ranches. The most notable, stock animal for siring mules was a very large Jack donkey of the “mammoth jack” breed. He was brought to Plano by the Haggard family in the 1850s. The rest is history...a thriving business and a symbol for downtown Plano was born.



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Mammoth Jack Historic Downtown Plano Brand

Goals

1. Create a memorable character and brand implementation that will differentiate Historic Downtown Plano (HDP) from other regional and local retail centers like Legacy and Collin Creek.
2. Generate a commercially viable brand that can be applied to a wide variety of merchandise that will be enthusiastically embraced by Planoites and visitors projecting HDP as a fun, approachable and vibrant environment.
3. Help establish HDP as an Art District by offering local artists a modified, approved versions of the Mammoth Jack brand, in both 2D and 3D formats, as a canvas for creative expression of sponsored public art.



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Mammoth Jack Historic Downtown Plano Brand

Objectives

1. Establish a historically relevant, memorable, likeable, and versatile brand icon exclusively for the promotion of Historic Downtown Plano. (HDP)
2. Develop legal parameters that will provide control and protection for the use of the name and image of Mammoth Jack Historic Downtown Plano brand.
3. Establish licensing structure for authorized use of the Mammoth Jack name and image with revenue to be used by the PID for promotional and beatification activities.



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Mammoth Jack Historic Downtown Plano Brand

Trademark Protected Use Applications

Great care will be given to protect the use rights of the brand and all its applications. Proper trademark fillings will be made. Brand use guideline will be issued to ensure proper and restricted applications.



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Mammoth Jack Historic Downtown Plano Brand

Branded, Licensed Promotional Merchandise



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Mammoth Jack Historic Downtown Plano Brand

Mammoth Jack Website



Events
Merchandise
Jack Story
Plano Story
Festival
Videos
Plano Links



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Mammoth Jack Historic Downtown Plano Brand

Mammoth Jack Festival



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Mammoth Jack Historic Downtown Plano Brand

Mammoth Jack Festival



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Mammoth Jack Historic Downtown Plano Brand

Mammoth Jack Festival



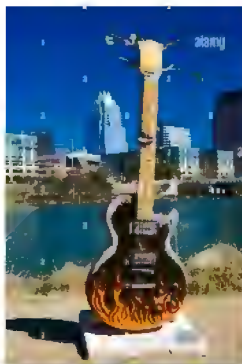
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Mammoth Jack Historic Downtown Plano Brand

Other City's Branded Icons



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Mammoth Jack Historic Downtown Plano Brand

Versatile Applications



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Thank you

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August 14th, 2025

CITY OF PLANO LONG-TERM FINANCIAL FORECAST UPDATE



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1

PROJECT BACKGROUND

Background

- Plano has sound financial policies and conservative budgeting practices that make it an example for many other Texas cities.
- Historically, Plano's Budget and Research Department has produced a Three-Year Financial Forecast to help advise near-term decision making with future implications.

Project Description

- NewGen was retained to refine and expand City forecasts by the development of a five-year General Fund forecasting model.
- With City leadership guidance, NewGen has developed a working, dynamic model that includes known and foreseeable model inputs to be used in FY 2026 planning and beyond.

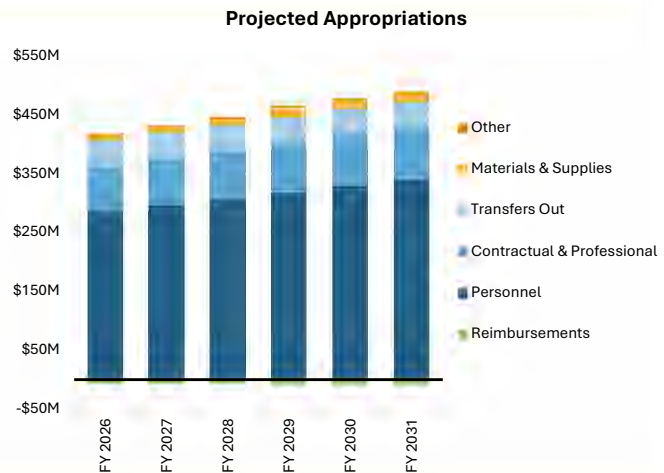
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GENERAL FUND EXPENDITURE

- Expenditures are projected to grow at an average of **3.2%** per year, based on current assumptions
- Uses FY 2025-26 budget as a starting point.
- Adds additional General Fund expenditures expected but not yet included in the budget.



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EXPENDITURE ASSUMPTIONS

Inflation factors

Inflation factors applied as part of 5-year projections:

- Salaries (3.0% per year)
- Health-related benefits (4.0% per year)
- Other benefits (3.0% per year)
- General inflation (2.5% per year)
- Water (4.3% - 8.0% per year)
- Fuel (3.0% per year)
- Electricity (2.0% per year)
- Gas (4.4% per year)
- Chemicals (1.4% per year)
- Other rates specific to individual budget lines

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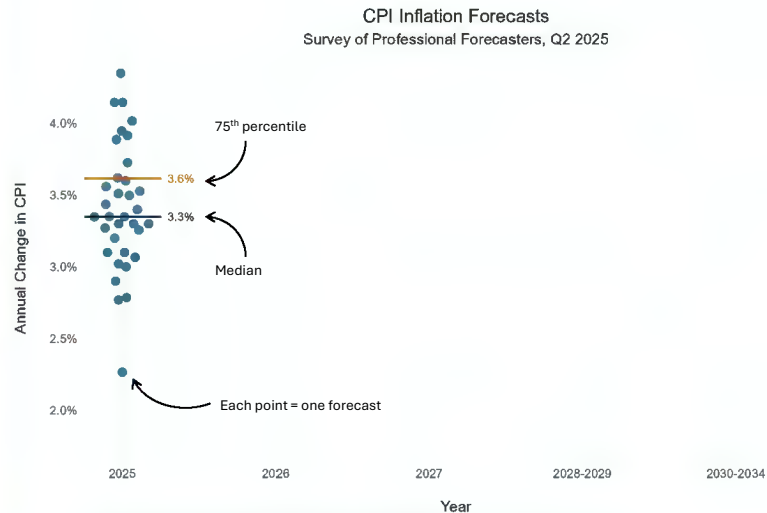
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EXPENDITURE ASSUMPTIONS

General Inflation Assumptions

- General inflation informed by *Survey of Professional Forecasters*

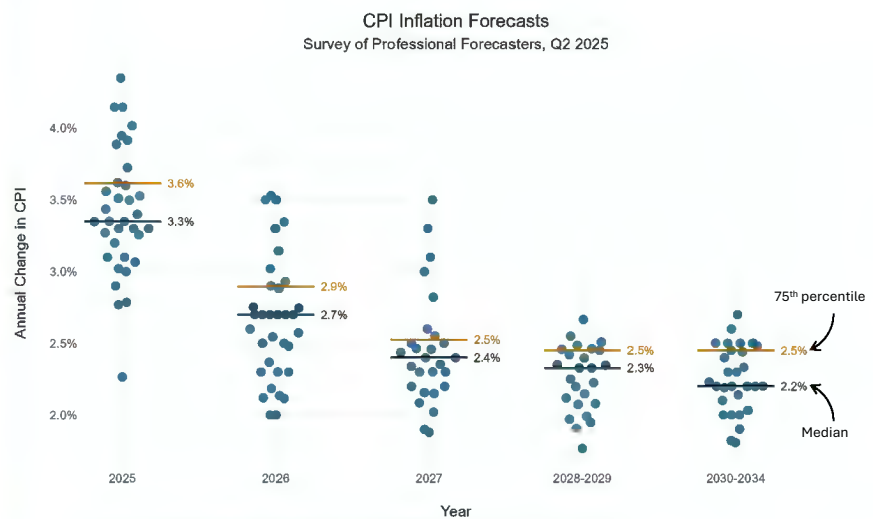


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- Propose using 75th percentile of forecasts as a conservative estimate



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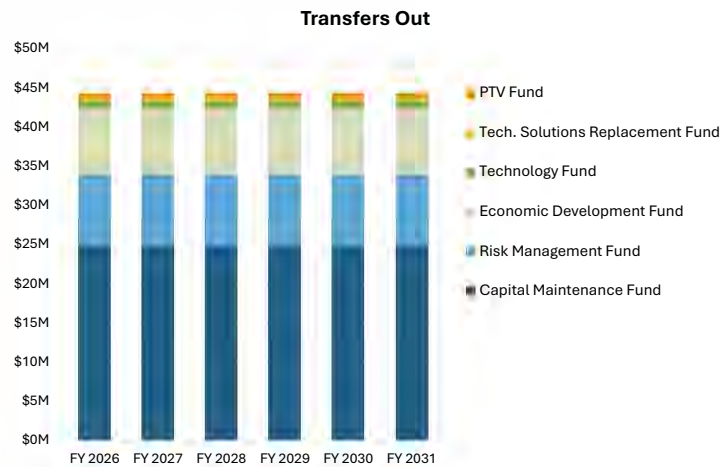
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EXPENDITURE ASSUMPTIONS

Transfers Out

- Transfers out of the General Fund are assumed to be fixed from FY 2025-26 onward (\$44.25 million)



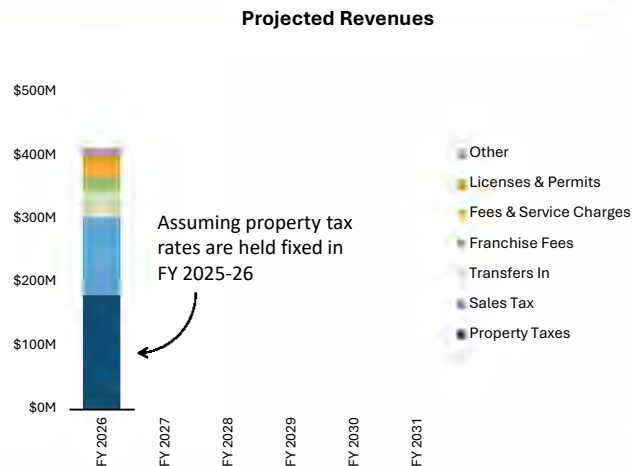
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GENERAL FUND REVENUES

- Property tax and sales tax comprise 73% of Plano's budgeted revenue
- Projections depend heavily on property tax assumptions, including changes in the tax base and future rates



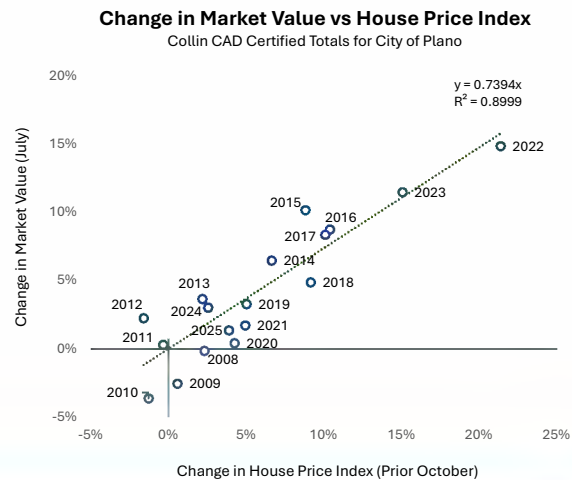
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PROPERTY TAX ASSUMPTIONS – MARKET VALUE

- Property tax projections are based on house price growth
- Historically, a high correlation between changes in house prices and subsequent changes in market values
- Every 1% increase in house prices → ~0.75% increase in market value in Central Appraisal District totals



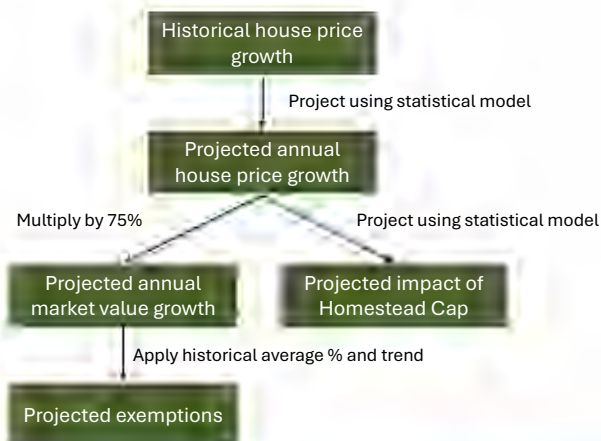
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PROPERTY TAX ASSUMPTIONS - SUMMARY

- Flow chart illustrates the method used to project taxable values for Plano's existing properties
- Market value of new improvements initially assumed to be \$750 M per year, falling to \$500 M (City estimates)



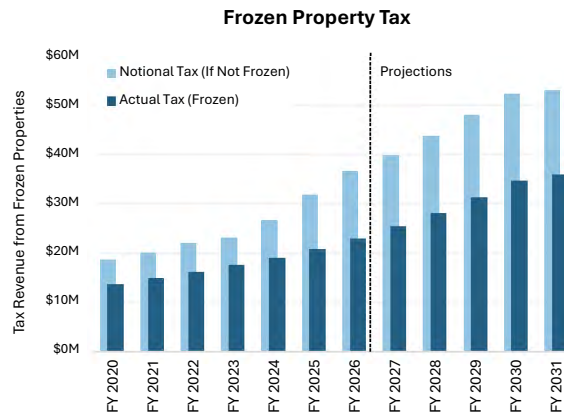
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PROPERTY TAX ASSUMPTIONS – PROPERTY TAX FREEZE

- Property tax freeze projections are based on recent trends in the share of taxable value affected by the freeze
- Growth in the share of frozen properties is assumed to peak in 2030 (based on demographic assumptions)



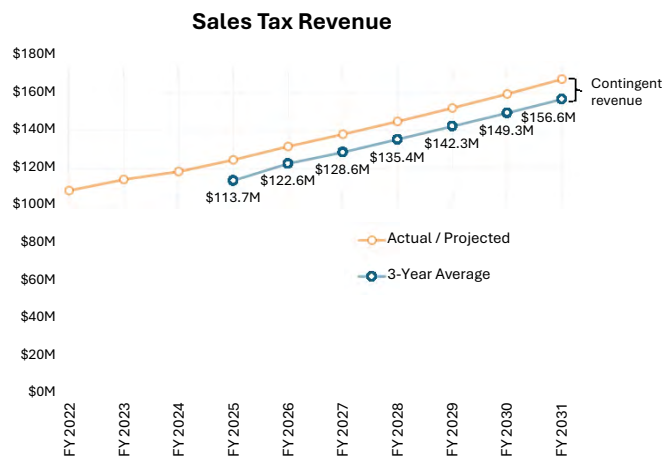
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SALES TAX ASSUMPTIONS

- Sales tax revenue projections are based on City estimates and forecasts provided by the City's sales tax consultant
- For budgeting purposes, the model maintains the City's policy of using average sales tax revenue from the past three years, plus 3% inflation



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REVENUE ASSUMPTIONS

Inflation factors

Inflation factors applied as part of 5-year projections:

- Cable and telephone franchise fee revenue (-5.0% per year)
- Other franchise fees (general inflation, 2.5% per year)
- Permits, charges and user fees (general inflation)
- Water and wastewater transfers in (per 2024 Rate Study)
- Other transfers in (3.0% per year)

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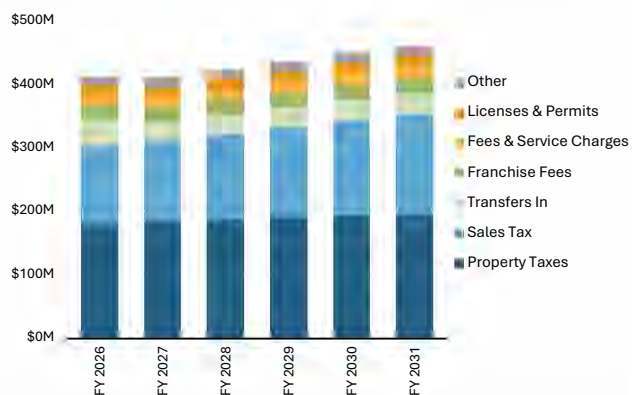
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GENERAL FUND REVENUES – NO NEW REVENUE

- Property tax revenues from existing properties could be held fixed (the No New Revenue rate, or NNR)
- Total revenues would increase at an average rate of **2.2%** per year

Projected Revenues



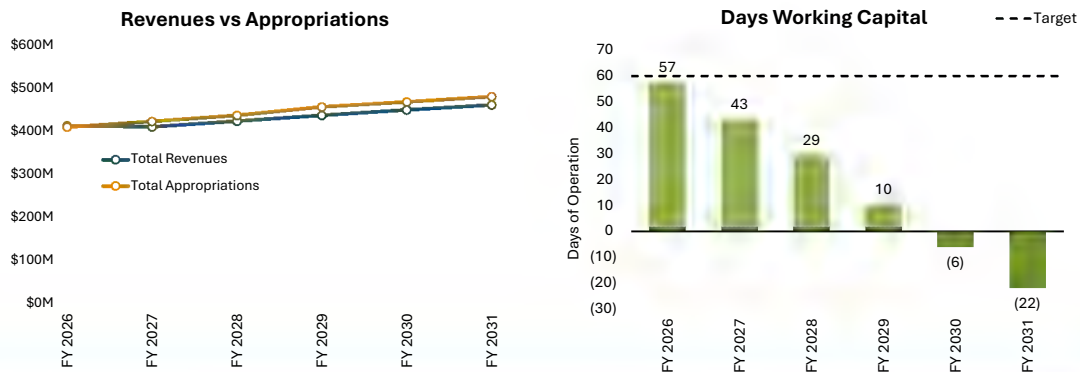
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EXPENDITURE VS REVENUES (NO NEW REVENUE RATE)

- Total appropriations would exceed revenues from FY 2026-27
- Revenues with NNR property tax increases would deplete fund balances



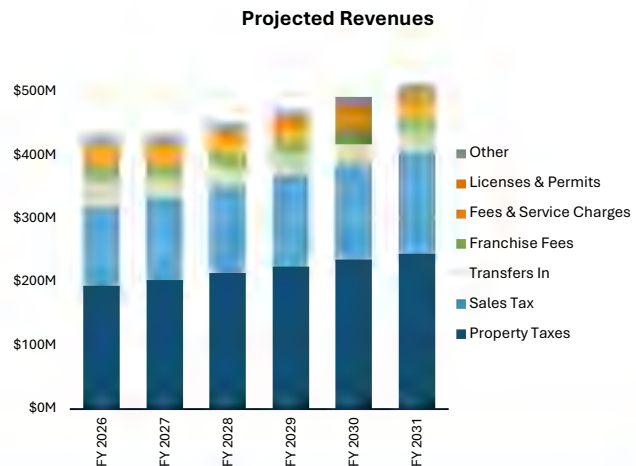
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GENERAL FUND REVENUES – VOTER APPROVAL RATE

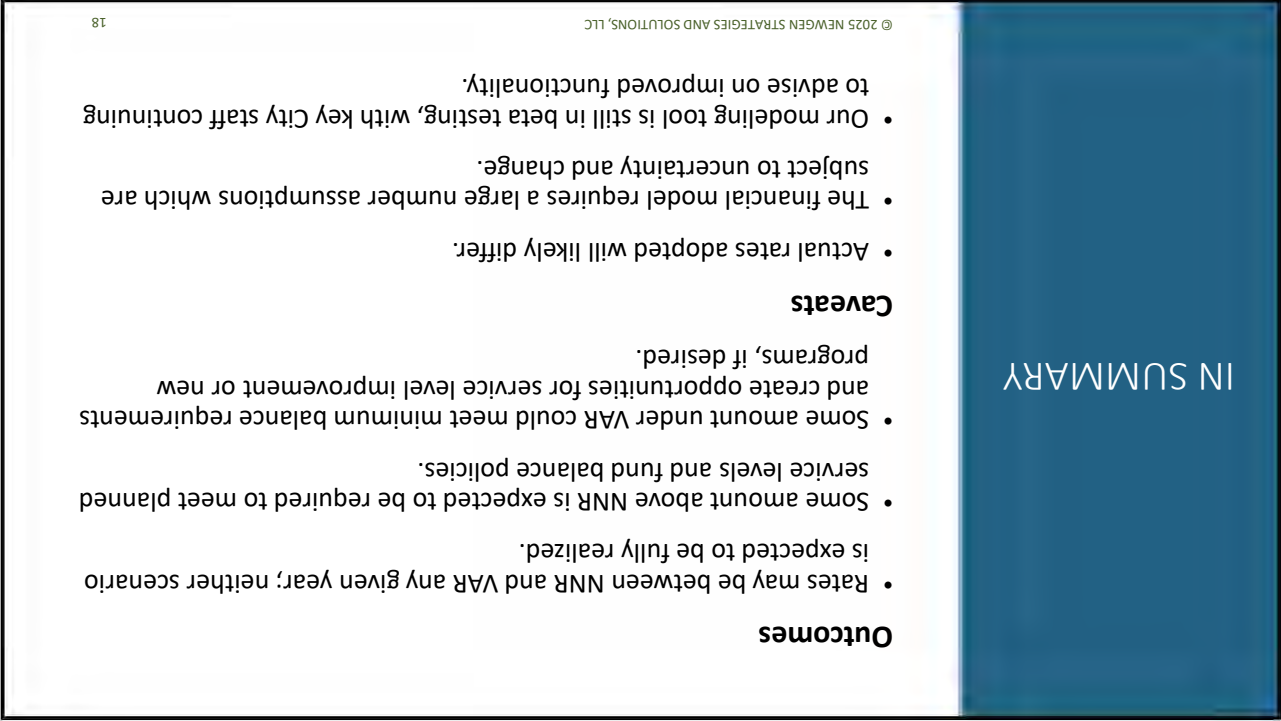
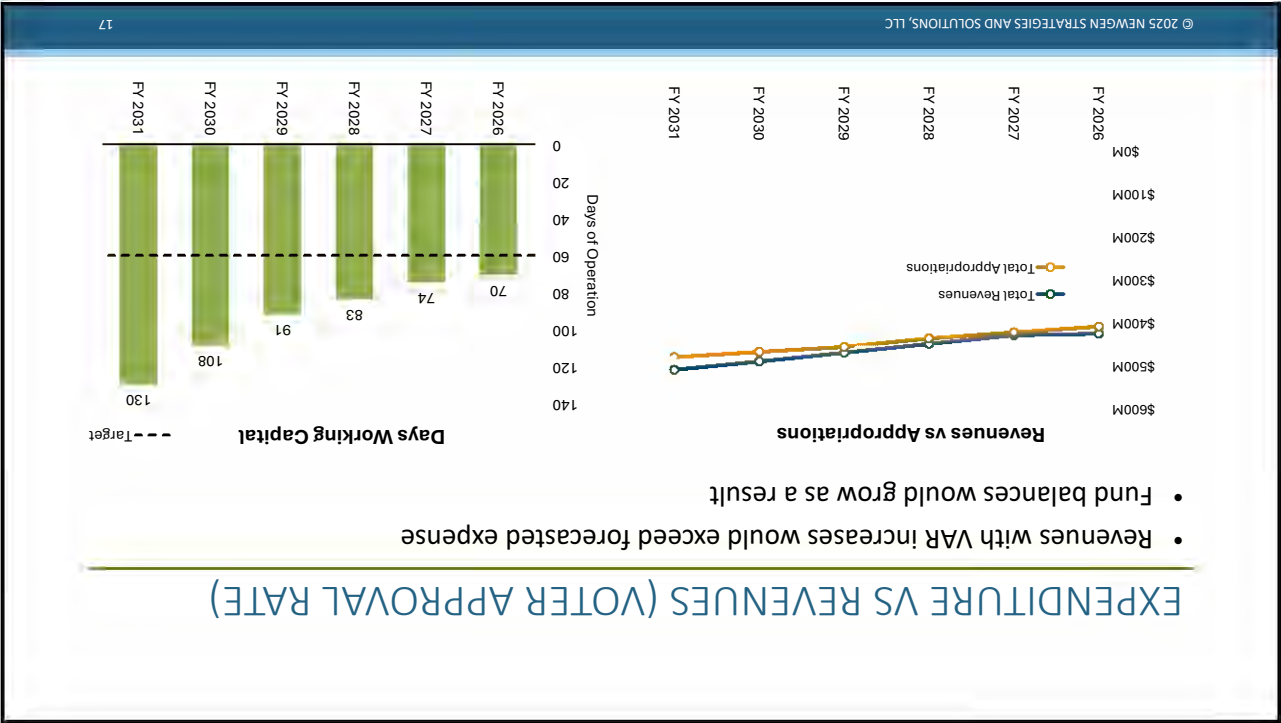
- Alternatively, property tax revenues from existing properties could be increased by 3.5% annually (Voter Approval Rate, or VAR)
- Total revenues would increase at an average rate of **3.7%** per year



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STATUS AND NEXT STEPS

Status

- We are approaching completion of Phase I with the modeling tool.
- Phase II is anticipated to begin soon.

Model Additions/Adjustments

- Continue working with staff to refine key output measures.
- Updating forward looking operational needs from budget requests or department business plans, e.g., new staff & equipment.
- Add debt forecasting inputs to approximate I&S tax rates.
- Refinements to revenue forecasts for projects/areas with economic incentives that change over time.

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THANK YOU

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Partner
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Plano

City of Excellence


FY 2025-26 Budget Work Session Tax Base & Tax Rate Presentation
August 14, 2025



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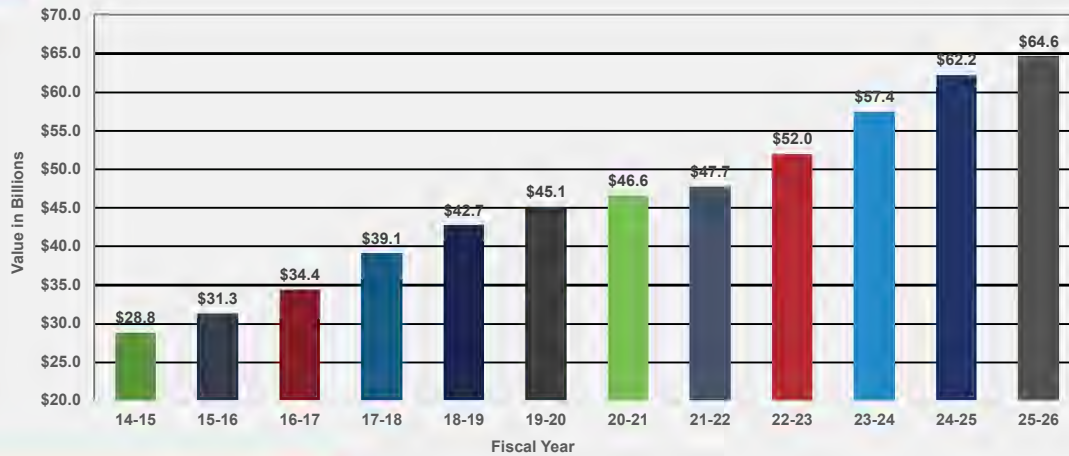
Assessed Property Values

Collin & Denton Certified Values



2

Assessed Property Valuations

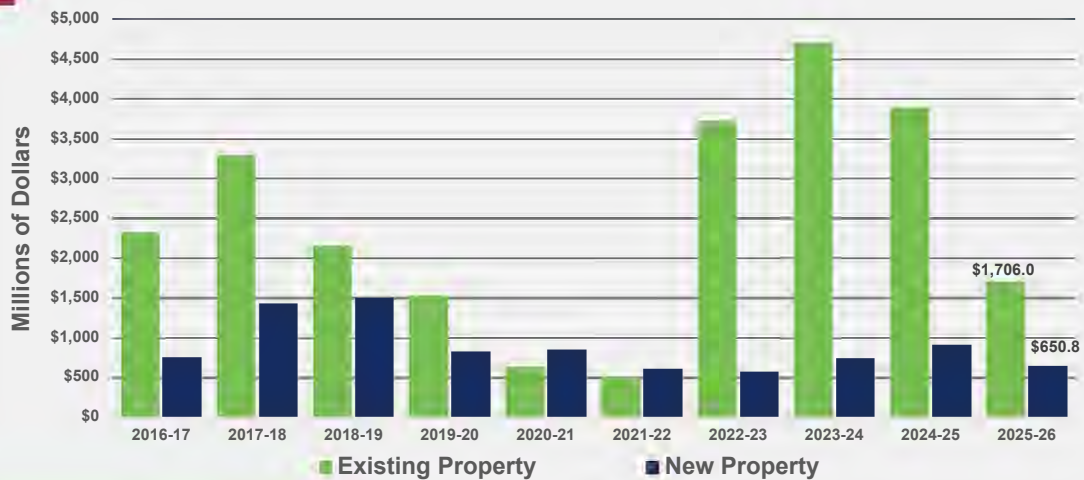


FY 2025-26 Budget Work Session - Revenues

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Change in Plano's Taxable Value



FY 2025-26 Budget Work Session - Revenues

4

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Taxes and the Average Market Home Value

2025-26 Proposed Tax Rates (City of Plano and PISD) and 2024-25 Adopted Tax Rates (Collin County and CCCCD)

Average Home Value \$591,947

	Tax Rate	\$ Amount	%
City of Plano	.4176	\$1,978	24.5%
PISD	1.0779	\$4,872	60.3%
Collin County	.1493	\$840	10.4%
CCCD	.0812	\$385	4.8%
TOTAL TAXES/YEAR	1.7260	\$8,075	100.0%

- Using the 2025-26 Proposed Tax Rate and the 2025 Average Market Home Value for the City of Plano and PISD portions and using the 2024-25 Adopted Tax Rates for all other taxing entities, this assumes that the General Homestead Exemptions were taken for the City of Plano (20%), for PISD (\$140,000), Collin County (greater of \$5,000 or 5%), and CCCCD (greater of \$5,000 or 20%).

FY 2025-26 Budget Work Session - Revenues

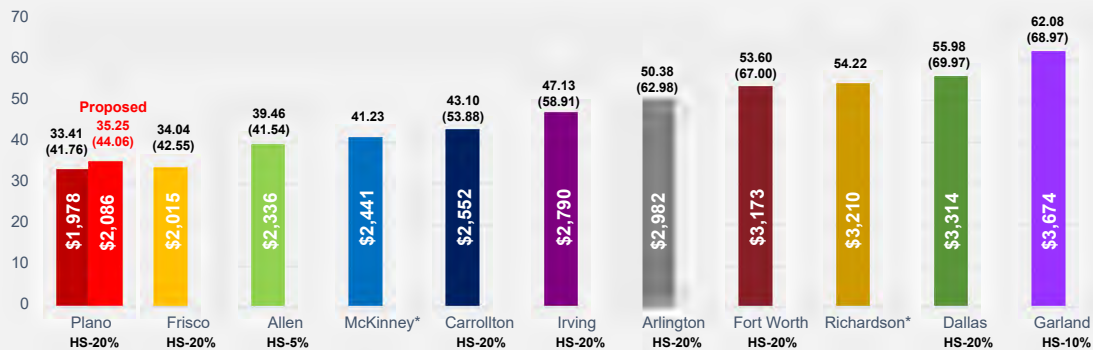
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Ad Valorem Tax Rates

Residential Customers Only With Homestead Exemption Applied to the Rate


Plano and Surrounding Cities - 2025-26 **PROPOSED** Tax Rates
Based on Plano **Average Market** Home Value of \$591,947
(Cents per \$100 Valuation)



*Cities do not offer Homestead Exemption

FY 2025-26 Tax Rate Analysis

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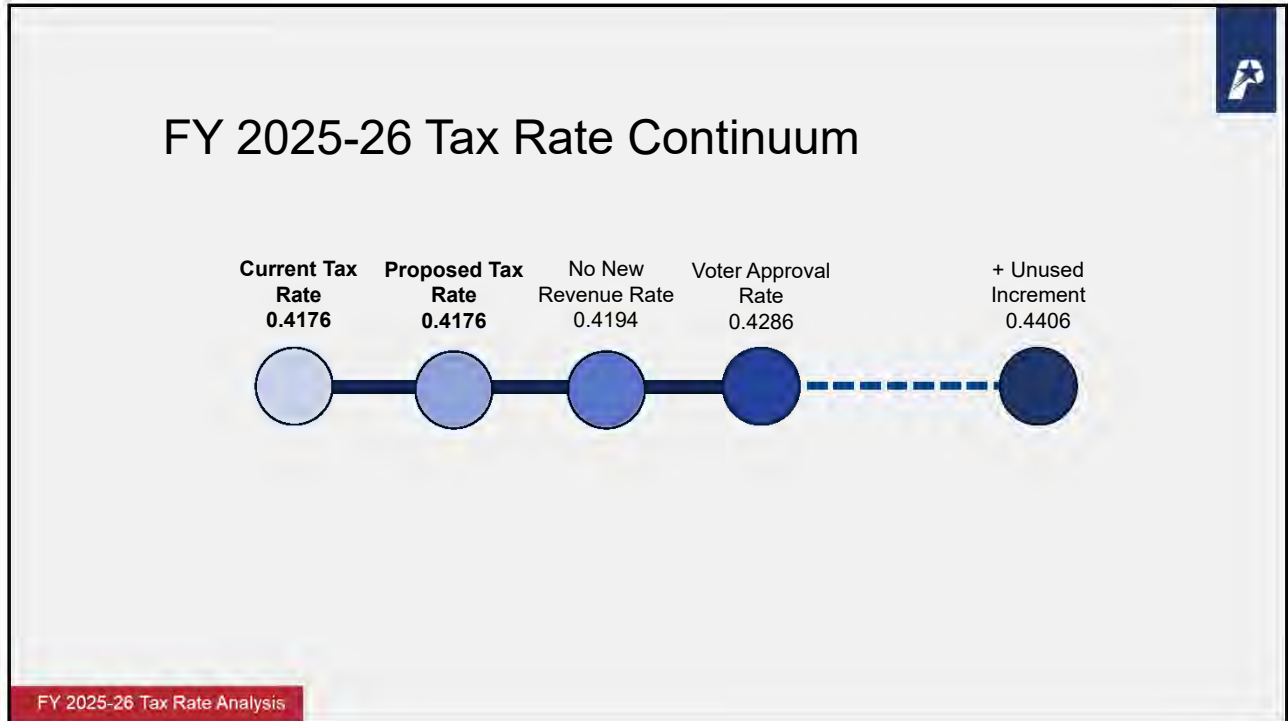


Tax Rates

No-New-Revenue Tax Rate

Voter Approval Tax Rate

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City of Plano Average Taxable Home Value – Tax Bill Comparison: 2024-25 Adopted vs. 2025-26 “Options”



Average Taxable Home Value

2024 Average Taxable Value
\$417,641

2025 Average Taxable Value
\$452,109

Change from Prior Year
\$34,468

	2024-25 Adopted Tax Rate	2025-26 Tax Rate “Option”	Change from Prior Year
2025-26 Proposed Tax Rate	41.76 ¢	41.76 ¢	0.00 ¢
Tax Bill for Avg Homeowner (Taxable)	\$1,744	\$1,888	\$144
2025-26 NNR Tax Rate	41.76 ¢	41.94 ¢	0.18 ¢
Tax Bill for Avg Homeowner (Taxable)	\$1,744	\$1,896	\$152
2025-26 VAR Tax Rate (without increments)	41.76 ¢	42.86 ¢	1.10 ¢
Tax Bill for Avg Homeowner (Taxable)	\$1,744	\$1,937	\$193
2025-26 VAR Tax Rate (with increments)	41.76 ¢	44.06 ¢	2.30 ¢
Tax Bill for Avg Homeowner (Taxable)	\$1,744	\$1,992	\$248



Sales Tax Projections

1

Sales Tax Cap Policy

2008

Cap on Sales Tax Projections \$57 Million

Limits the amount of collections used for existing operating expenditures

Any amount collected over \$57M cap

One-time expenditures

Capital Maintenance Fund

Economic Development Incentive Fund

Offset following year's budget

2012

Cap changed to three-year average

Stabilizes revenue source during periods of declining sales tax

2019

Revised methodology to reflect a mid-year true up that re-estimates expected sales tax revenue

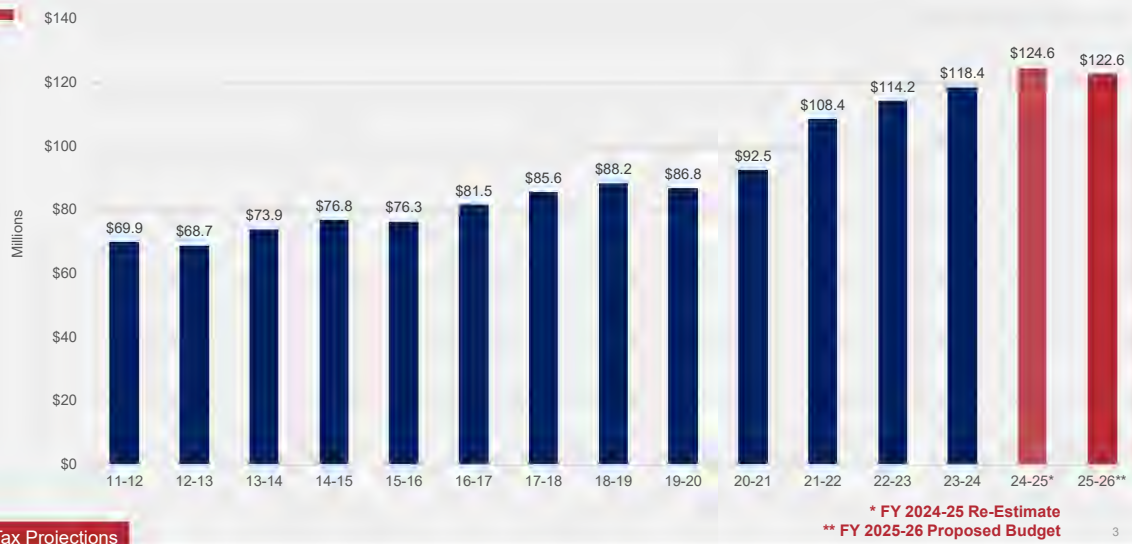
2023

Add inflation to the three-year average, if needed

Sales Tax Projections

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Annual Sales Tax Receipts

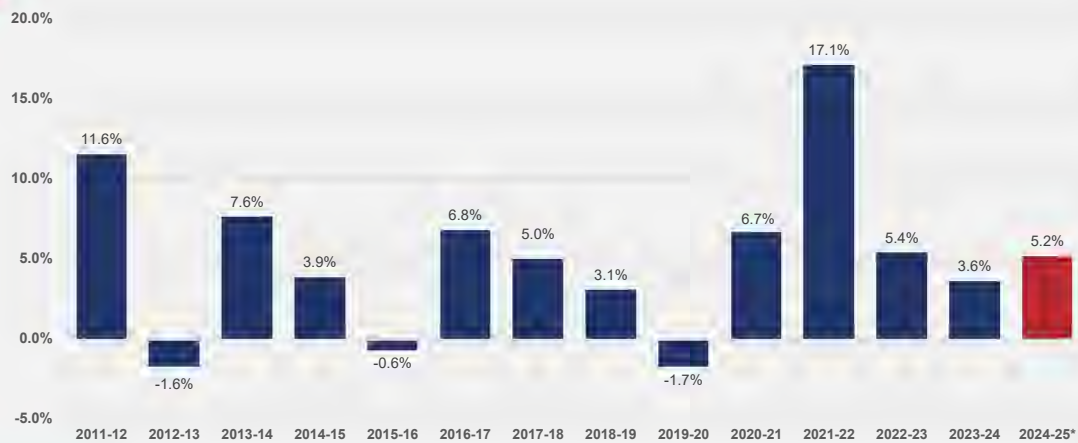


Sales Tax Projections

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Annual Sales Tax Receipt Percentage Changes From Prior Year Actual



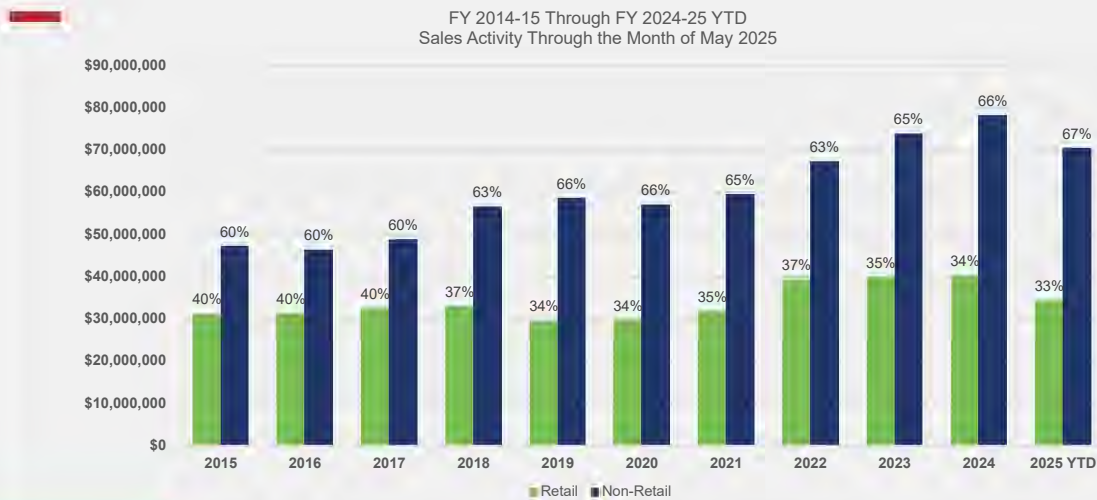
Sales Tax Projections

* Projected

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Retail & Non-Retail Collections Comparison

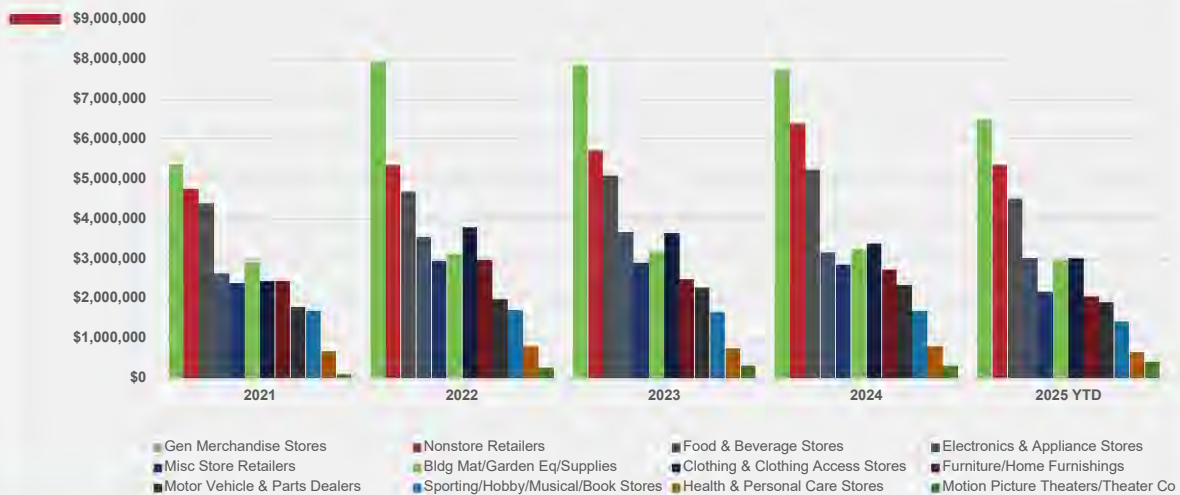


Sales Tax Projections

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Plano's Major Retail Industries

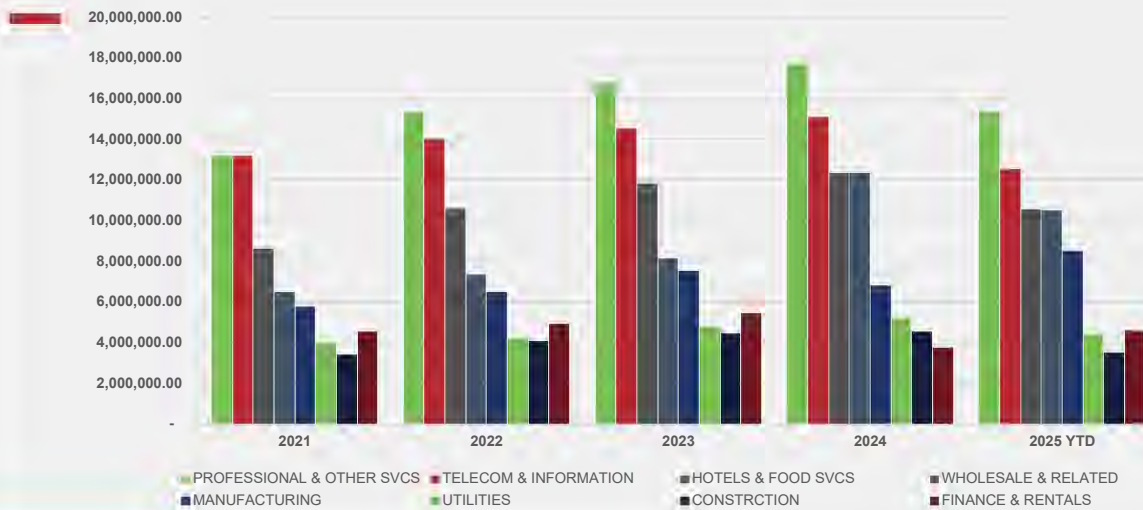


Sales Tax Projections

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Plano's Major Non-Retail Industries

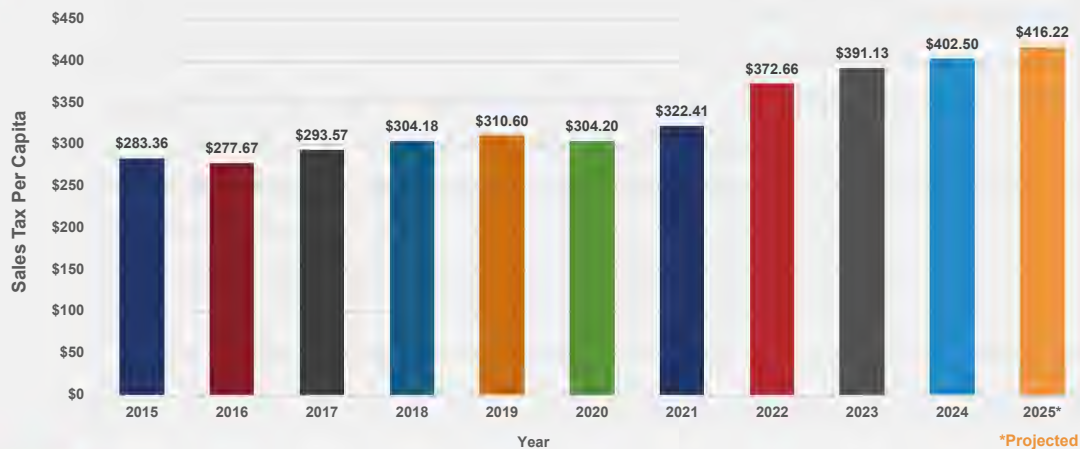


Sales Tax Projections

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Sales Tax Per Capita



Sales Tax Projections

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Factors Impacting Sales Tax



- Competition from surrounding cities
- Economic Conditions
- Movement of businesses out of the City
- Business versus Retail
- Audit Adjustments
- “Back to School” Sales Tax Holiday
- City of Plano is limited in their projections by a City Council Policy of a three-year average
 - Any amount collected over that amount can be transferred to the Capital Maintenance Fund, Rainy Day Fund, Economic Development Incentive Fund or used for one-time expenses.



August 14, 2025

WATER AND WASTEWATER RATE STUDY 2025 UPDATE CITY OF PLANO, TX



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1

KEY POINTS

Background:

- NewGen conducted a five-year Water & Sewer Rate Study for the City of Plano in 2024
- Given cost pressures, it was projected that annual rate increases of 8.0% per year would be needed from FY 2025-26 to FY 2028-29
- Additionally, the City decided to increase the rate charged for the lowest tier of residential water use (from 1,000 to 5,000 gallons). These rates would be set equal to the projected cost of wholesale water, with the changes to be phased in by FY 2026-27.

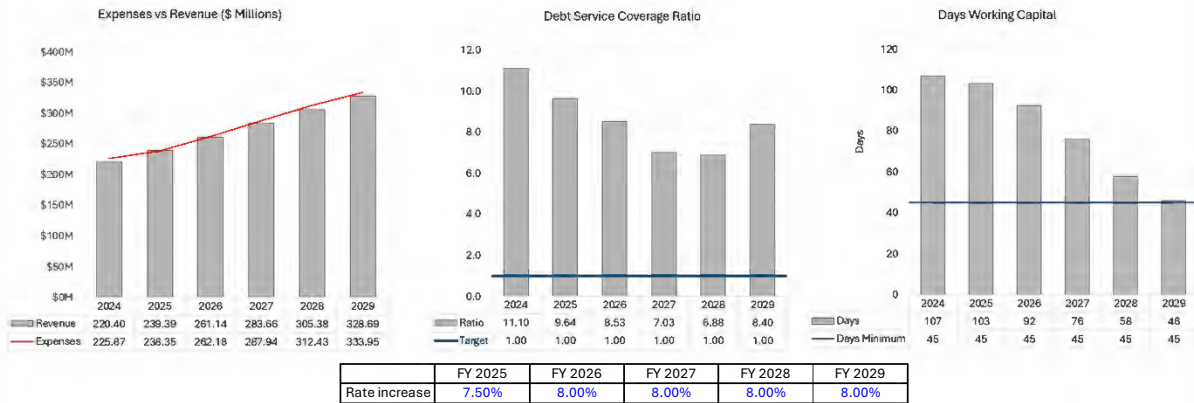
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FINANCIAL PLAN OUTCOMES – ORIGINAL STUDY

- The original rate study identified annual rate increases of 7.5% in FY 2024-25, and 8.0% in subsequent years, needed to meet a working capital target of 45 days:



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KEY POINTS

This Update:

- NewGen has updated this study to reflect:
 - The City of Plano's latest budget for FY 2025-26
 - Slightly lower projected water costs from NTWMD over the five-year period
 - Updated inflation projections
 - An increase in the working capital requirement from 45 to 90 days
- The net effect of these changes is to reduce the projected rate increase in FY 2025-26 from 8.0% to 7.0%.
- It also reduces the projected rates on the lowest billed water tier for Residential customers (relative to the original study)
- From FY 2026-27 onward, rate increases of 8.0% will continue to be needed to meet the City's financial targets for the Water & Sewer Fund.

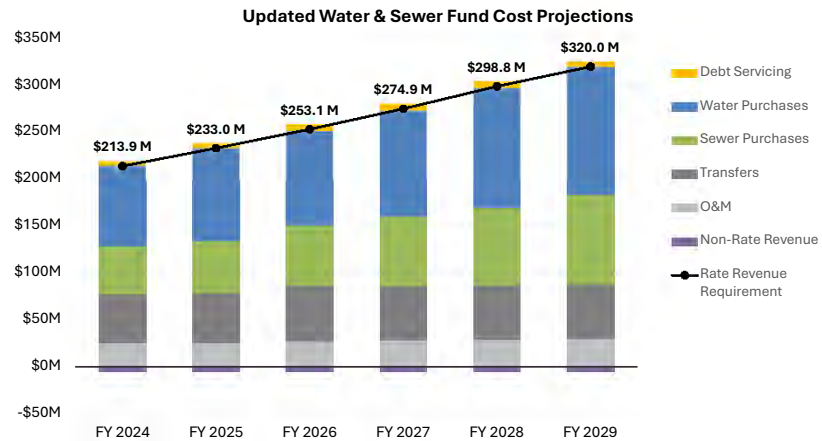
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WATER & SEWER FUND COST PROJECTIONS

- Total rate revenue needs are projected to rise at an average rate of 8.4% per year from FY 2023-24
- Primarily reflects growth in wholesale water and sewer costs, rising from 64% to 72% of total revenue needs by FY 2028-29



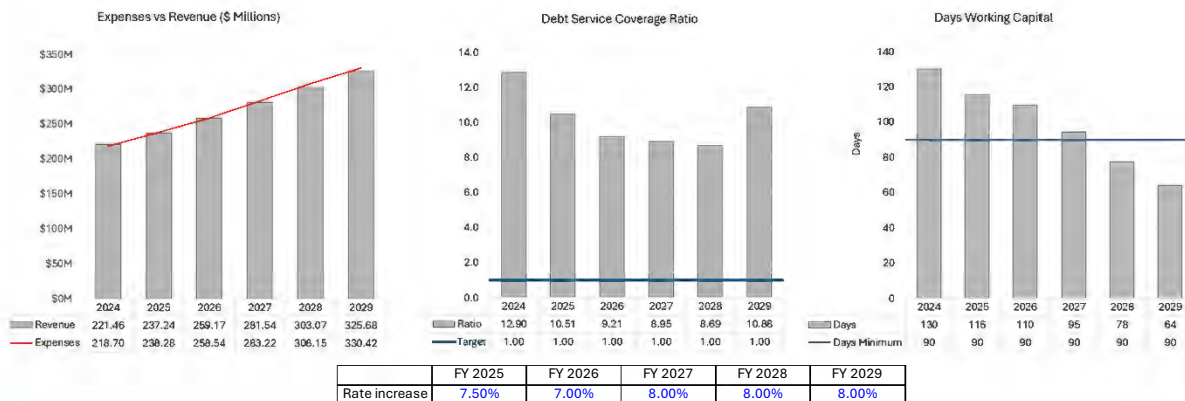
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FINANCIAL PLAN OUTCOMES – UPDATED STUDY

- The updated rate plan achieves a higher target of 90 days, at least until FY 2026-27
- The projected increase in FY 2025-26 is reduced to 7.0%, with 8.0% increases in later years:



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WATER RATE INCREASES – RESIDENTIAL

Residential Water Rates

Water Rate Component	FY 2024 Previous	FY 2025 Current Rates	FY 2026 Proposed
Minimum (\$ per month)*	\$28.89	\$28.89	\$30.90
Volumetric (\$ per kgal)			
0 – 1,000 gal	\$0.00	\$0.00	\$0.00
1,001 – 5,000 gal	0.89	\$2.20	\$3.45
5,001 – 20,000 gal	4.37	4.70	5.05
20,001 – 40,000 gal	8.73	9.40	10.10
40,001+ gal	10.58	11.30	12.10

* For Residential 5/8", 3/4" and 1" meters
Larger meters will increase

1st Year of Phase-in,
increased by \$1.31

2nd Year of Phase-in,
increasing by \$1.25

Increased by
7.50% (rounded)

Increasing by
7.00% (rounded)

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7

7

- The projected change in typical Residential bill is illustrated below

Residential Monthly Water & Sewer Bill



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5-YEAR BILL IMPACT

Residential

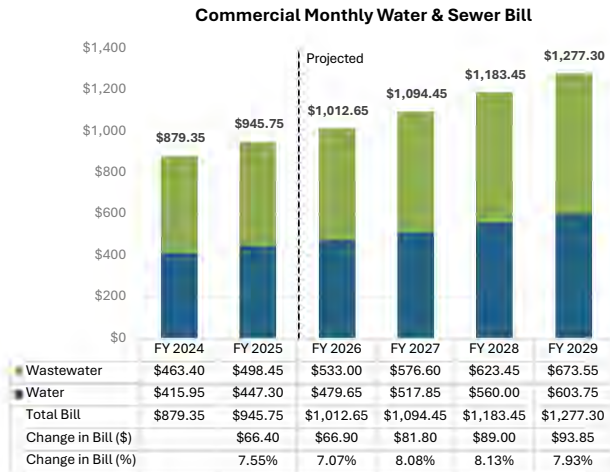
- 3/4" meter
- Water 10,000 gal
- Sewer 5,000 gal (reflecting winter average)

5-YEAR BILL IMPACT

Commercial Bills

- 2" meter
- Water 50,000 gal
- Sewer 50,000 gal

- The projected change in typical Commercial bill is illustrated below:



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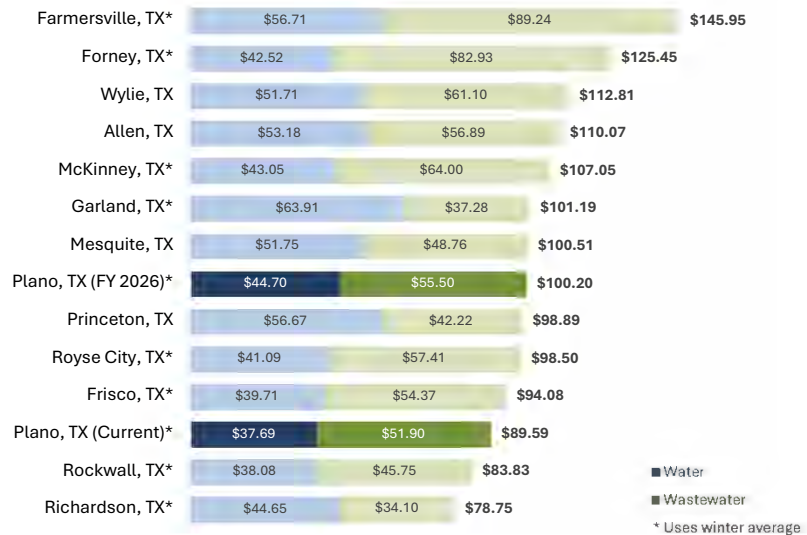
9

BILL COMPARISON

Residential bills

- 3/4" meter
- Water 5,000 gal
- Sewer 5,000 gal

Residential 3/4" Monthly Bill for 5,000 Gal Water / 5,000 Gal Sewer



Bill comparisons are based on information accessed from entities' websites

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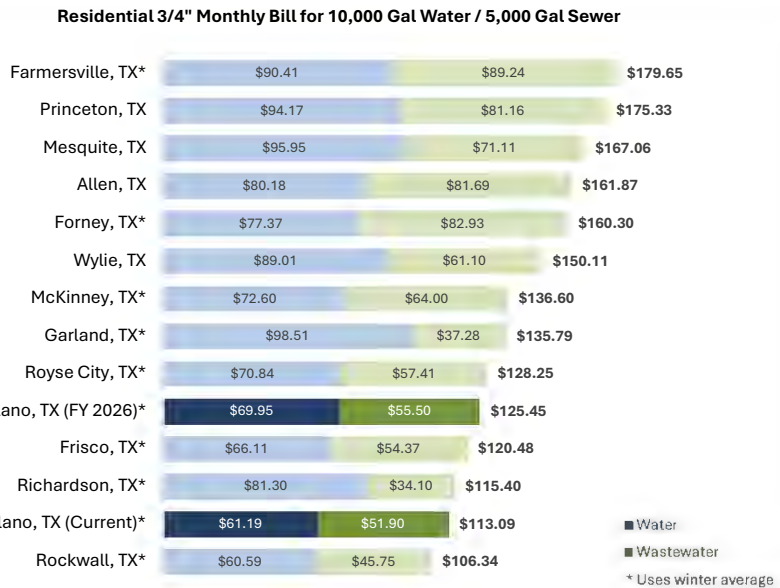
10

BILL COMPARISON

Residential bills

- 3/4" meter
- Water 10,000 gal
- Sewer 10,000 gal
- Sewer 5,000 gal if using winter average

Bill comparisons are based on information accessed from entities' websites



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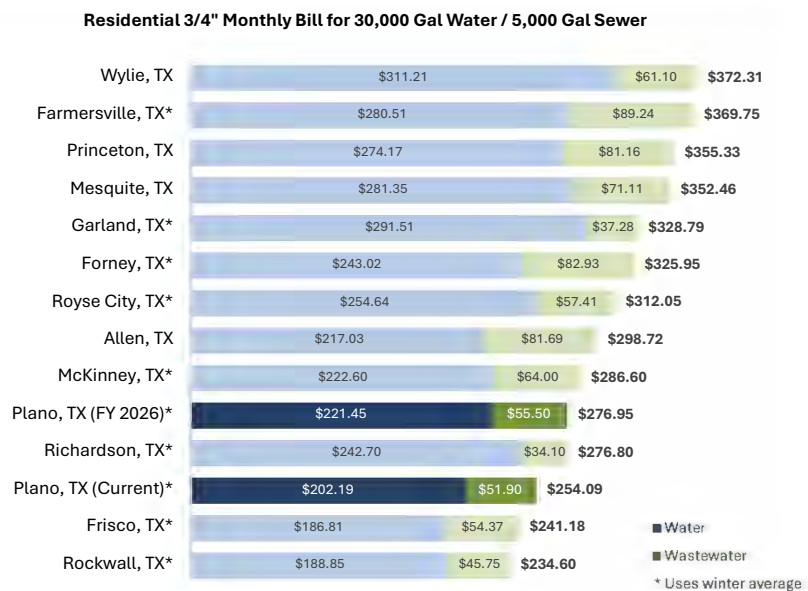
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BILL COMPARISON

Residential bills

- 3/4" meter
- Water 30,000 gal
- Sewer 30,000 gal
- Sewer 5,000 gal if using winter average

Bill comparisons are based on information accessed from entities' websites



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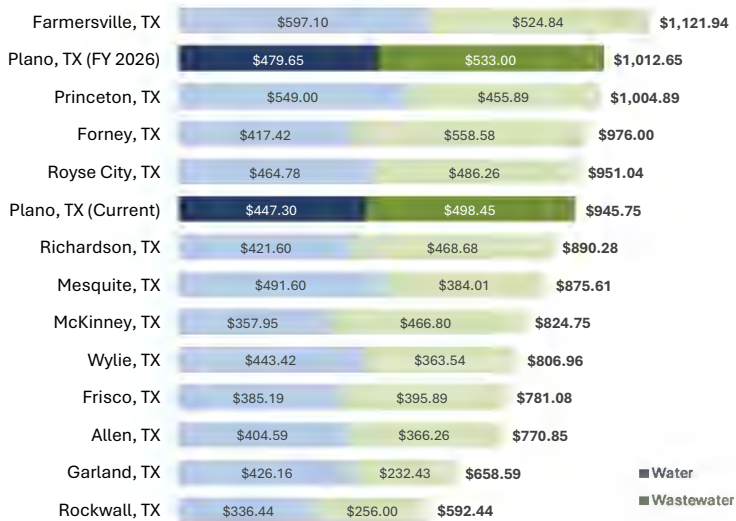
BILL COMPARISON

Commercial bills

- 2" meter
- Water 50,000 gal
- Sewer 50,000 gal

Bill comparisons are based on information accessed from entities' websites

Commercial 2" Monthly Bill for 50,000 Gallons



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13

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NEXT STEPS



- Staff to include rate revisions as part of Fiscal Year 2025-26 budget
- Council to adopt revised rates effective October 1, 2025
- Notify customers of rate changes on the bill

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14



Solid Waste Fund & Proposed Rates

Abby Owens
Director of Public Works

August 14, 2025 Budget Work Session

1

Rate Study Recommendations - Residential

Proposed Rate Increases	Current Rate	Year 3 FY 2026	Year 4 FY 2027	Year 5 FY 2028
Proposed Rate Increase (95 gal)		\$1.00	\$1.00	\$ 1.00
Proposed Monthly Rate				
95 Gallon Carts	\$ 24.60	\$ 25.60	\$ 26.60	\$ 27.60
68 Gallon Carts ¹	\$ 17.61	\$ 18.32	\$ 19.04	\$ 19.75
Extra Cart ²	\$ 20.50	\$ 21.33	\$ 22.16	\$ 23.00

1. 68-Gallon Cart rate is approximately 72% of 95-gallon cart rate.
2. Extra Cart rate is approximately 83% of 95-gallon cart rate.

Solid Waste Fund & Proposed Rates

2

NTMWD Solid Waste Member City Residential Rate Comparisons



3

Downtown Plano Commercial Proposed Rate

Based on new fee recovery policy, recommend 10% increase. Rates last increased in 2011.

	Current Rate	Proposed Rate
Business Rate:		
< 1,000 ft ²	\$14.25	\$15.68
≥ 1,000 ft ² and ≤ 11,000 ft ²	\$41.60	\$45.76
> 11,000 ft ²	\$255.00	\$280.50
Restaurant Rate:		
< 1,000 ft ²	\$0.06 per ft ²	\$0.066 per ft ²
≥ 1,000 ft ²	\$0.094 per ft ²	\$0.103 per ft ²



Solid Waste Fund & Proposed Rates

4



Solid Waste Fund Balance

	Working Capital	Days of Operation
FY 2016-17	\$5,268,641	77
FY 2017-18	\$3,976,958	58
FY 2018-19	\$2,897,664	43
FY 2019-20	\$1,495,499	22
FY 2020-21	\$1,983,495	26
FY 2021-22	\$(586,699)	0
FY 2022-23	\$1,765,708	21
FY 2023-24*	\$2,371,840	27
FY 2024-25 (<i>re-estimate</i>)*	\$4,260,266	47
FY 2025-26**	\$5,381,803	55

* Includes 7-year repayment of \$2.5M loan from Water & Sewer Fund

** Includes proposed rate increases

Solid Waste Fund & Proposed Rates

Streambank Stabilization Program Update

B. Caleb Thornhill, P.E. – Director of Engineering

Alison Smith, P.E. – Engineer, Sr.

Russell Erskine, P.E. – Engineer, Sr.

City Council
August 14, 2025

1

Streambank Stabilization - Timeline

- Preliminary Open Meeting – 8/8/2022
- Citywide Streambank Assessment – 3/2023 – 4/2024
- Streambank Database Complete – 3/2025
- Council Update – 4/28/2025
- Council Update – 6/9/2025
- Discussion/Recommendations – 7/30/2025
- Discuss Rates City Council Budget Session – 8/14/2025

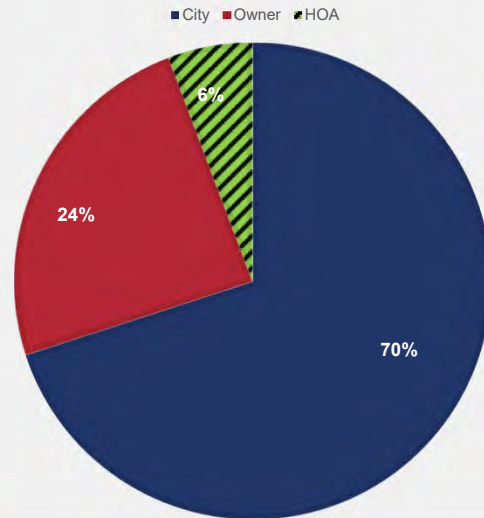
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Streambank Stabilization - Locations



- 3,000+ Erosion Locations Identified
- Sites with score <60: 646
 - City/Parks = 425
 - Private Owner = 180
 - HOA = 41

RESPONSIBILITY (PER PLAT LANGUAGE)



3

Streambank Stabilization – Discussion Needed Ownership



Critical (0-20)

City-Owned

32 locations
\$6.75M

HOA Property

1 locations
\$150,000

Private Ownership – 9 Locations

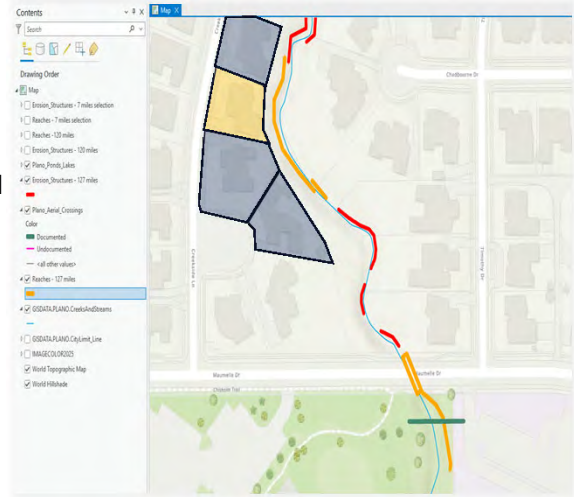
\$3.45 M
4 – golf course(s)
1 – NTMWD/City
4 – Residential

4

Streambank Stabilization – Ownership Critical Sites



- Private owner agrees dedicate property rights to City
 - Flat fee obtained from Property Owner(s)
 - \$10K – Residential and HOA
 - \$20K – Non-residential
- City performs boundary survey to determine potential encroachments
- All encroachments removed at private owner's costs prior to beginning design
- City begin design of improvements
- Easement exhibit documents created at 60% design



5

Streambank Stabilization – Maintenance



- Evaluate non-Critical locations for City-staff maintenance/repair.
- Evaluate non-Critical locations for requirements contracts.
- Determine performance metrics over the next year and establish budget
- Re-evaluate maintenance after one year

6

Streambank Stabilization – Policy



- Ownership – Address all Streambank Stabilization for properties that fall within the Critical scoring criteria.
- Acquisition – Rights dedicated & Encroachments cleared prior to beginning design.
- Participation – Prior to beginning design:
 - \$10K – Residential and HOA
 - \$20K – Non-residential
- Reassess citywide streambank conditions every 5 years.
- Reassess streambank stabilization policy every 5 years.

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Streambank Stabilization – Questions?



8

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Municipal Drainage Rate Scenario #1



No Rate Increase, No Streambank Projects

	2024-25 Budget	2024-25 Re-Est	2025-26 Proposed	2026-27 Projection	2027-28 Projection	2028-29 Projection
Beginning Fund Balance	\$ 4,009,223	\$ 6,786,519	\$ 5,428,436	\$ 2,787,868	\$ (468,071)	\$ (5,091,901)
Revenue	\$ 10,139,768	\$ 10,202,792	\$ 10,243,079	\$ 10,283,251	\$ 10,323,584	\$ 10,364,079
Total Resources	\$ 14,148,991	\$ 16,989,311	\$ 15,671,515	\$ 13,071,119	\$ 9,855,513	\$ 5,272,178
Total Appropriations	\$ 5,447,075	\$ 5,415,450	\$ 6,350,097	\$ 6,330,868	\$ 6,514,849	\$ 6,704,297
Transfers	\$ 1,568,340	\$ 1,568,340	\$ 1,679,990	\$ 1,714,790	\$ 1,750,633	\$ 1,787,552
Revenue Debt Transfer	\$ 4,677,085	\$ 4,577,085	\$ 4,853,560	\$ 5,493,532	\$ 6,681,932	\$ 7,679,532
Ending Fund Balance	\$ 2,456,491	\$ 5,428,436	\$ 2,787,868	\$ (468,071)	\$ (5,091,901)	\$ (10,899,204)

Municipal Drainage Rates 2025-26

1

1

Municipal Drainage Rate Scenario #2



Rate Increase, No Streambank Projects

	2024-25 Budget	2024-25 Re-Est	2025-26 Proposed	2026-27 Projection	2027-28 Projection	2028-29 Projection
Beginning Fund Balance	\$ 4,009,223	\$ 6,786,519	\$ 5,428,436	\$ 4,422,042	\$ 3,851,422	\$ 1,923,653
Revenue	\$ 10,139,768	\$ 10,202,792	\$ 11,877,253	\$ 12,968,571	\$ 13,019,645	\$ 13,070,924
Total Resources	\$ 14,148,991	\$ 16,989,311	\$ 17,305,689	\$ 17,390,612	\$ 16,871,067	\$ 14,994,577
Total Appropriations	\$ 5,447,075	\$ 5,415,450	\$ 6,350,097	\$ 6,330,868	\$ 6,514,849	\$ 6,704,297
Transfers	\$ 1,568,340	\$ 1,568,340	\$ 1,679,990	\$ 1,714,790	\$ 1,750,633	\$ 1,787,552
Revenue Debt Transfer	\$ 4,677,085	\$ 4,577,085	\$ 4,853,560	\$ 5,493,532	\$ 6,681,932	\$ 7,679,532
Ending Fund Balance	\$ 2,456,491	\$ 5,428,436	\$ 4,422,042	\$ 3,851,422	\$ 1,923,653	\$ (1,176,805)

Rate Increases:

- Residential – \$1.50/month (avg.)
- Commercial – \$0.028 per 100 sq ft of impervious area

Municipal Drainage Rates 2025-26

2

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Municipal Drainage Rate Scenario #3



Rate Increase, Streambank Projects Included

	2024-25 Budget	2024-25 Re-Est	2025-26 Proposed	2026-27 Projection	2027-28 Projection	2028-29 Projection
Beginning Fund Balance	\$ 4,009,223	\$ 6,786,519	\$ 5,428,436	\$ 4,362,042	\$ 3,511,422	\$ 1,077,653
Revenue	\$ 10,139,768	\$ 10,202,792	\$ 11,877,253	\$ 12,968,571	\$ 13,019,645	\$ 13,070,924
Total Resources	\$ 14,148,991	\$ 16,989,311	\$ 17,305,689	\$ 17,330,612	\$ 16,531,067	\$ 14,148,576
Total Appropriations	\$ 5,447,075	\$ 5,415,450	\$ 6,350,097	\$ 6,330,868	\$ 6,514,849	\$ 6,704,297
Transfers	\$ 1,568,340	\$ 1,568,340	\$ 1,679,990	\$ 1,714,790	\$ 1,750,633	\$ 1,787,552
Revenue Debt Transfer	\$ 4,677,085	\$ 4,577,085	\$ 4,913,560	\$ 5,773,532	\$ 7,187,932	\$ 8,422,132
Ending Fund Balance	\$ 2,456,491	\$ 5,428,436	\$ 4,362,042	\$ 3,511,422	\$ 1,077,653	\$ (2,765,405)

Rate Increases:

- Residential – \$1.50/month (avg.)
- Commercial – \$0.028 per 100 sq ft of impervious area

Streambank Erosion Projects:

\$10M over 3 years (Critical Projects)

Municipal Drainage Rates 2025-26

3

3

Municipal Drainage Rate Scenario Summary



No Rate Increase, No Streambank Projects

	2024-25 Budget	2024-25 Re-Est	2025-26 Proposed	2026-27 Projection	2027-28 Projection	2028-29 Projection
Ending Fund Balance	\$ 2,456,491	\$ 5,428,436	\$ 2,787,868	\$ (468,071)	\$ (5,091,901)	\$ (10,899,204)

Rate Increase, No Streambank Projects

	2024-25 Budget	2024-25 Re-Est	2025-26 Proposed	2026-27 Projection	2027-28 Projection	2028-29 Projection
Ending Fund Balance	\$ 2,456,491	\$ 5,428,436	\$ 4,422,042	\$ 3,851,422	\$ 1,923,653	\$ (1,176,805)

Rate Increase, Streambank Projects Included

	2024-25 Budget	2024-25 Re-Est	2025-26 Proposed	2026-27 Projection	2027-28 Projection	2028-29 Projection
Ending Fund Balance	\$ 2,456,491	\$ 5,428,436	\$ 4,362,042	\$ 3,511,422	\$ 1,077,653	\$ (2,765,405)

Municipal Drainage Rates 2025-26

4

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Compensation & Benefit Plan Update

City Council Budget Work Session
August 14, 2025

1

Return on Investment in People

Rank	2024-2025 Accolades
#1	Happiest Big City in America - SmartAsset
#1	Happiest City in Texas (#17 in the U.S.) - WalletHub
#1	Best Park System in Texas (#16 in the U.S.) - Trust for Public Land
#3	Safest City in the U.S. - WalletHub
#4	Best Place to Raise a Family in America - WalletHub
#5	Best Mid-size Employer in the U.S. (within Gov't Sector) - Forbes
#6	Best City to Live in the U.S. - Niche
#6	Most Affordable City in the U.S. - Motley Fool Money
#12	Best City for Jobs - WalletHub



2

2

City's Commitment to Our Employees



3

3

Who are we?

2,336 Full-time Employees | 84%

446 Part-time Employees | 16%

523 Seasonal Employees

9.14 Years Tenure (PT & FT)

10.54 Years Tenure (FT)

26 Departments

649 Job Titles

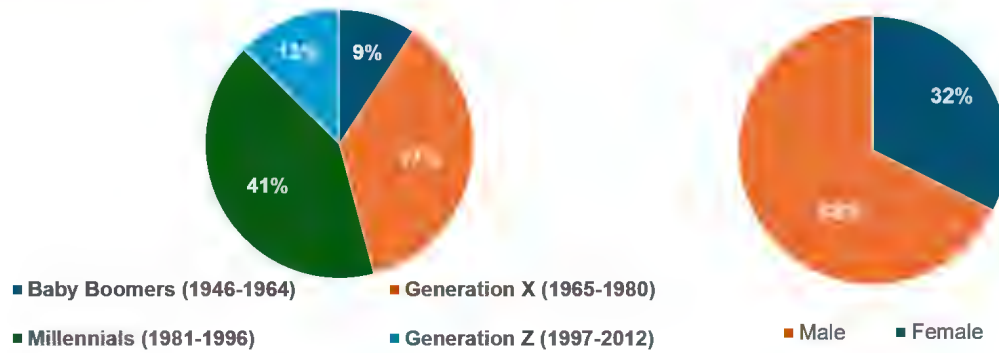
* As of July 1, 2025; stats exclude seasonal employees unless denoted otherwise.



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Employees by Generation & Gender



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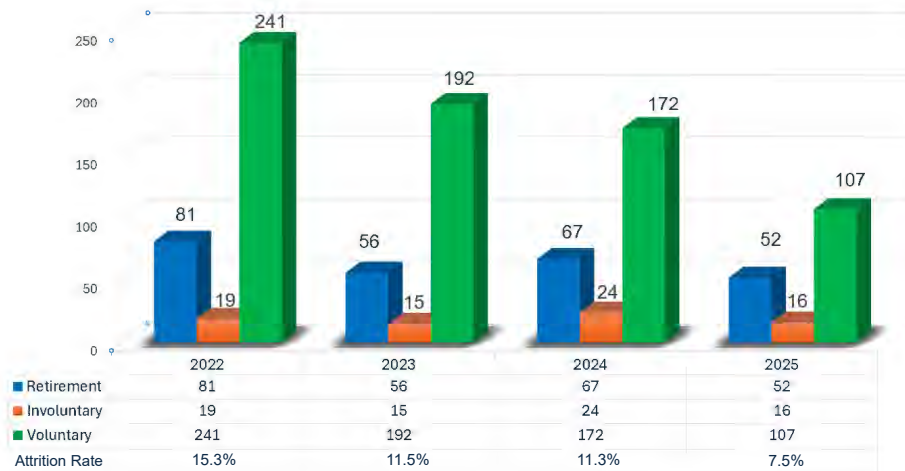
Employee Hire Rate



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Employee Attrition Rate



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Eligibility for Retirement

	Currently Eligible	2026	2027	2028	2029
Executive	77%	80%	80%	83%	87%
Management	47%	50%	56%	62%	66%
General Employee	26%	28%	32%	36%	38%

* As of July 1, 2025 & Full-Time employees only



8

8



Overview of Compensation and Benefit Changes

9

Compensation – Build a Stronger Pay Framework



2024 Comprehensive Market Study Launched



Target Salary Midpoint at Competitor Median +5%



Updated Pay Plans provide increased flexibility, resulting in more competitive and fair compensation aligned with experience and qualifications.



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Compensation Philosophy & Practice

- ❑ Lead market competitors by median + 5%
- ❑ Progress employees to midpoint of salary range within 6 years
- ❑ Job Family Progressions & Promotional Opportunities
- ❑ Market Compensation Study (conducted every other year)



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Compensation Key Changes*

Change	Effective Date	Description
3% Across-the-Board Increase	Sept. 29, 2025	Reflects on Oct. 9 paycheck
On-Call & Certification Pay	Oct. 1, 2025	Stipends for non-exempt on-call and roles requiring specialized licenses/certifications.
Police Pay Plan Compression	Oct. 1, 2025	8-step structure enables top pay in 5 years
Wage Determination Tool Update	Jan. 5, 2026	Aligns midpoint at 6-year mark; Drives consistent and equitable pay decisions
Market Study Cadence	Ongoing	Every two-year review; next scheduled for 2027

**Subject to City Council Approval*



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Medical Plan Redesign (Why the Change?)

Current (Stacked Model)



Limits personalization and flexibility

2026 (Two Distinct Plan Options)



Better cost alignment and flexibility for employee needs

* Out of state dependents still have access to a national network (PHCS)



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2026 Medical Plan Comparison

2025 Plan Option			2026 Plan Options	
Plan Highlights	WebTPA Tier 1: Healthcare Highways	WebTPA Tier 2: Aetna	WebTPA Healthcare Highways Plan	WebTPA Aetna Plan
Annual Deductible	\$625 individual \$1,250 family	\$1,250 individual \$2,500 family	\$1,000 individual \$2,000 family	\$2,500 individual \$5,000 family
Out-of-Pocket Max	\$5,000 individual \$10,000 family	\$9,200 individual \$18,400 family	\$8,000 individual \$16,000 family	\$10,150 individual \$20,300 family
Coinurance	10% after deductible	20% after deductible	20% after deductible	30% after deductible
Preventive Services	Covered at 100%	Covered at 100%	Covered at 100%	Covered at 100%
Telehealth	\$5 copay	\$5 copay	\$5 copay	\$5 copay
Office Visit	\$25 copay	\$25 copay	\$25 copay	\$25 copay
Specialist Visit	\$40 copay	\$40 copay	\$40 copay	\$40 copay
Urgent Care	\$40 copay	\$50 copay	\$40 copay	\$50 copay
Emergency Room	Deductible + \$200	Deductible + \$200	Deductible + \$200	Deductible + \$200
Monthly Contributions	2025 Employee Premium	Healthcare Highways Employee Premium City Contribution	Aetna Employee Premium City Contribution	
Employee Only	\$71.00	\$71.00 \$668.00	\$96.00 \$681.00	
Employee + Spouse	\$354.00	\$354.00 \$1,554.00	\$478.00 \$1,527.00	
Employee + Child(ren)	\$222.00	\$222.00 \$1,139.00	\$300.00 \$1,129.00	
Employee + Family	\$558.00	\$558.00 \$2,200.00	\$753.00 \$2,143.00	



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What is staying the same ?

Dental & Vision

- ❑ Same Plan Design
- ❑ Slight premium increases

FSA

- ❑ Flex Spending Accounts are still available with either plan

Pharmacy

- ❑ No changes to Pharmacy Benefits or Copays

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Return on Investment in People

A competitive compensation structure & comprehensive benefits package

- Attracts and retains the most qualified talent
- Promotes higher employee engagement
- Encourages long-term service and loyalty
- Improves productivity and employee well-being
- Reinforces a culture of commitment and excellence across the City of Plano

Rank	2024-2025 Accolades
#1	Happiest Big City in America - SmartAsset
#1	Happiest City in Texas (#17 in the U.S.) - WalletHub
#1	Best Park System in Texas (#16 in the U.S.) - Trust for Public Land
#3	Safest City in the U.S. - WalletHub
#4	Best Place to Raise a Family in America - WalletHub
#5	Best Mid-size Employer in the U.S. (within Gov't Sector) - Forbes
#6	Best City to Live in the U.S. - Niche
#6	Most Affordable City in the U.S. - Money Fool Money
#12	Best City for Jobs - WalletHub



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16

How does Plano remain Competitive?



Culture of Excellence backed by Resources

A culture of excellence backed by resources that help employees deliver top performance and service to the Plano community.



Budget Allocations

Budget allocations that support employee recruitment, retention and development.



Ongoing Reviews

Regular review and management of its Compensation and Benefit Plans (regardless of external pressures)



17

17



Thank you!

18

Financial Policies: Cost Recovery Policy

I. Purpose

The Cost Recovery Policy (“Policy”) is a framework established to recoup the appropriate level of costs associated with providing programs and services. A sound and consistent policy serves as a management tool for establishing, implementing, and evaluating various fees and revenue options.

The Policy is designed to provide staff with consistent guidelines in pricing services, use of facilities, and establishing fees based on the balance of benefit extended to the community at-large and individual users.

It is the intent of the Policy to provide City Council with guidelines upon which to review and approve fees and cost recovery targets and to provide an appropriate level of flexibility to make decisions consistent with the City’s vision, values and desire for fiscal responsibility.

Cost recovery represents the City’s strategy to generate revenue by charging fees for some programs and services to offset the costs of providing those services. The cost recovery targets are based on various factors and establish a range from 0 to 100+ percent of total costs. Cost recovery should be applied thoughtfully, considering factors like cost effectiveness, policy consistency, and market impact.

II. Administration & Implementation

The Budget and Research Department is responsible for administering this Policy. Each department providing services is responsible for implementing the cost recovery policy.

III. Guiding Principles

A. The guiding principles for the creation of an effective cost recovery policy are as follows:

1. Effective and appropriate funding strategies from the General Fund, user fees, and other revenue sources should be based on categories of service and level of community versus individual benefit.
2. Impact on accessibility, fairness, and affordability should be considered when establishing fees.

B. Desired outcomes are:

1. Improved efficiency in recovery of costs associated with provision of programs, services, and facilities.
2. Balance appropriate cost recovery targets for programs, services and facilities with the desire to maintain an affordable property tax rate.
3. Reduce reliance on property taxes by substituting with fee revenue.
4. Financial sustainability by achieving established cost recovery targets.

IV. Definitions

- A. Benefit is the degree to which services impact the public (individual and community), or in other words, the results or outcomes of services.
 - 1. Community Benefit provides economic, environmental, social value; maintains or improves quality of life for the taxpaying community.
 - 2. Individual Benefit provides benefits exclusively to the user or users of the service, including, but not limited to, skill-building, entertainment, exclusive use, relationship building or financial gain.
- B. Best Practices are professional procedures that have been deemed as being correct or most effective by the respective profession/industry.
- C. Cost Recovery Model is a framework with a philosophical underpinning that guides the City's pricing for programs and services.
- D. Cost Recovery Rate is the performance metric for cost recovery, expressed as a percentage (revenue divided by expense).
- E. Cost Recovery Target is a goal set for the performance metric, such as percentage of cost recovery.
- F. Direct Cost includes all the specific, identifiable expenses (fixed and variable) associated with providing a service, program or facility. These expenses would not exist without the program or service and often increase exponentially.
- G. Indirect Cost encompasses overhead (fixed and variable) including the administrative costs of the agency. These costs would exist without any of the specific programs or facilities.
- H. Special Populations means groups of people with unique needs to which the City may target services. Examples include seniors, families, people with disabilities, and the economically disadvantaged.
- I. Tier refers to levels that provide the framework for the cost recovery model that function to define categories of activities by outcomes or benefits and target markets.
- J. Total Cost includes all costs associated with provision of services including direct and indirect costs, and consideration for the inclusion of market-based fee assessments for individual benefit or special services.
- K. User may include, but is not limited to, an individual or group of individuals, organization, business, corporation or other entity which receives an individual benefit from City services.

V. Cost Recovery Model

- A. Cost recovery, including fees, charges, and other methods to recover costs, is considered a responsible and necessary means to supplement tax revenue and provide a higher level of services that benefit the community. This policy establishes the methodologies for establishing fees and charges based on these goals, market conditions, benchmarking, demand, cost recovery targets, and industry trends.

B. Tier of Service and Cost Recovery Targets

1. Primary Community Benefit

This type of benefit provides the broadest public and community benefit to the City and should be primarily funded by the City's General Fund. These include programs, services, and facilities that the City must provide to effectively govern and operate. These services are essential and provide the fundamental components of the City's health, safety and economic and community vitality.

a. Cost Recovery Target:

- i. Benefits: Community / Public
- ii. Cost Recovery: 0%-10%
- iii. Basis: Best Practices and Trends

2. Considerable Community Benefit

This type of benefit provides programs, services, and facilities that primarily provide a community benefit combined with some individual benefit. The public at-large benefits even if they may not be the direct users of the service because it enhances the overall quality of life of the community. This level provides an important public benefit and range of benefits to a user. Funding for this level is primarily by tax funds with a small offset of fees to reflect the individual benefit.

a. Cost Recovery Target:

- i. Benefits: Primarily Community & Limited Individual User
- ii. Cost Recovery: 11%-40%
- iii. Basis: Best Practices, Market Comparison, Direct Costs

3. Balanced Community & Individual Benefit

This type of benefit provides programs, services, and facilities that provide a balanced community and individual user benefit. Fees are set to recover a larger percentage of cost than those falling within lower tiers and are offset by a balanced contribution from City funds.

a. Cost Recovery Target:

- i. Benefits: Balanced User & Community
- ii. Cost Recovery: 41%-60%
- iii. Basis: Market Comparison, Direct Costs

4. Considerable Individual Benefit

This type of benefit consists of discretionary programs, services, and facilities that the City may provide when additional funding or revenue exists to offset the cost of providing those services. Such services offer an important public benefit, but primarily benefit a user and should reflect a balanced funding strategy that requires a large portion of the cost be recovered through fees.

a. Cost Recovery Target:

- i. Benefits: Primarily User & Some Community
- ii. Cost Recovery: 61%-90%

iii. Basis: Market Comparison, Direct & Indirect Costs

5. Primary Individual Benefit

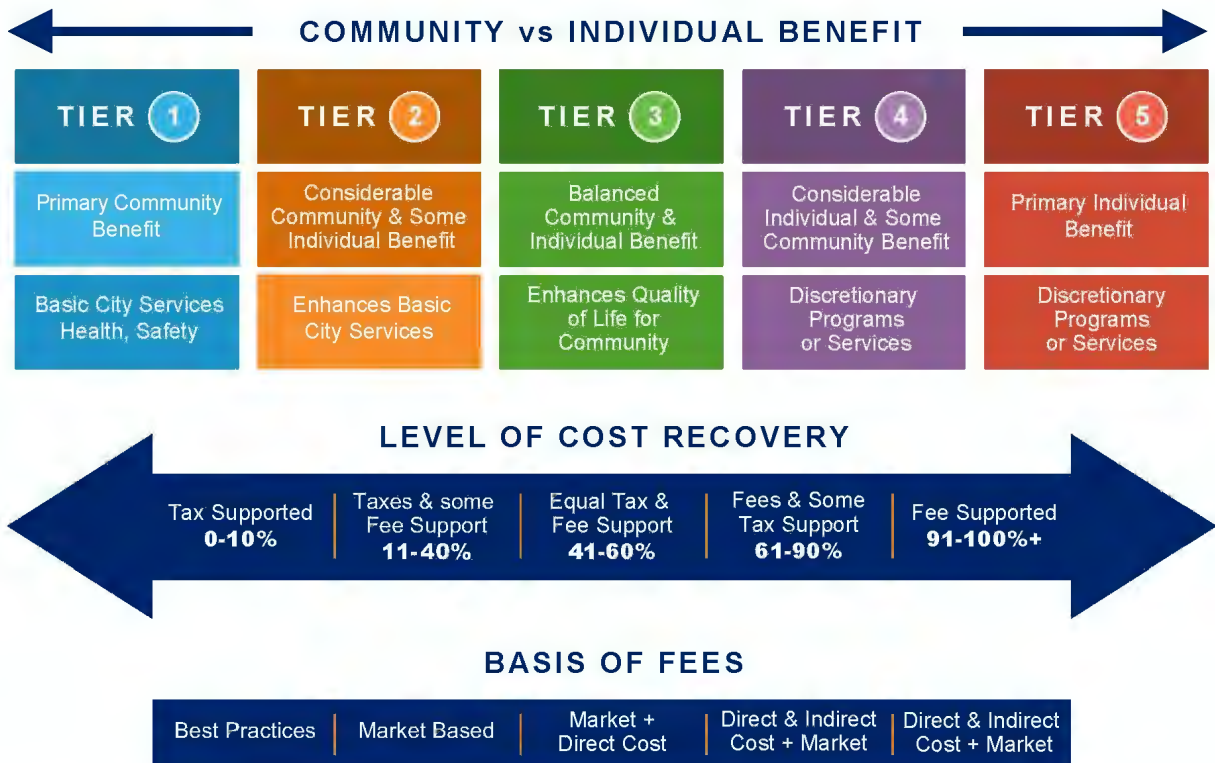
This type of benefit primarily provides a benefit to the program or service user. Consequently, the City should fully recover the cost of providing these programs and services through fees. These programs and services provide added value to the user above and beyond what is required or expected of a municipality. Pricing for these programs, services or facility use should be established based on a consideration of cost to the City and market rate for comparable programs, services or facility use. Some of these fees may be set above 100% cost recovery if based on market rates.

a. Cost Recovery Target:

- i. Benefits: User
- ii. Cost Recovery: 91%-100% +
- iii. Basis: Market Comparison, Direct & Indirect Costs

Cost Recovery Model

A Cost Recovery Policy establishes a framework to recoup associated program and service costs



VI. Cost Recovery Principles

A. The setting of the fee levels should follow these five principles:

1. Efficiency: the fees are simple and are not cumbersome to administer;

2. Effectiveness: the fees provide value for users and adequately capture the appropriate level of cost recovery;
3. Purpose & Clarity: users are clear about when and how fees apply;
4. Equity: the fees are fairly applied across a range of users; and
5. Ethics: the fees are clearly linked to the service provided and are not excessive.

VII. Reviewing & Establishing Fees

- A. It is important to review and adjust fees as necessary to ensure they remain aligned with service delivery goals, cost recovery targets, market conditions, and industry trends.
- B. Once a fee is assigned to the cost recovery target and approved by Council, only in special circumstances should fees be allowed to move to a lower cost recovery target.
- C. Annual Fee Review recommendations will be completed by departments by January 1 each year to incorporate into the future fiscal year as part of the budget process.
- D. Fee adjustments may be considered outside of the budget process for significant changes in service delivery or other factors such as legislative changes.
- E. A comprehensive cost and fee analysis should occur at least every three years for Enterprise Funds and every four years for all other funds, including the General Fund. Calculation of cost of services may include:
 1. Direct costs
 2. Indirect costs
 3. General Overhead (citywide vs. department/direct service)
 4. Market based value - define when market is used and what the market includes
 - a. Organizational approach
 - b. Public sector / private sector (competition factor)
 5. Other Considerations
 - a. Resident versus Non-resident
 - b. Mandated services
 - c. Special Populations
 - d. Life-Safety services or training
 - e. Specialized services
 - i. Life-safety classes (e.g. swim, AED, CPR)
 - ii. public health or economic benefit

iii. Drives desired resident behavior (e.g. environmental)

- F. The cost recovery goal for non-residents should be at or above 100% of the service delivery cost, subject to administrative feasibility.
- G. Funds collected for retail sales and/or concessions are not considered fees for the purpose of the cost recovery policy; however, cost recovery targets should be set at Tier 5 for these funding sources.
- H. Fees and charges for City services which frequently fluctuate based on contract terms, availability of service or other factors (e.g. recreation classes, field trips, equipment rental, etc.) may be approved by the department director based on an established cost recovery target approved by council via resolution.
- I. Fees and charges for various city services will be established by Resolution unless state law requires adoption by ordinance.

VIII. Monitoring & Reporting

- A. Annually, the Office of Budget and Research will provide to City leadership a detailed analysis of the full costs and revenues measured against cost recovery targets or benchmarks as it relates to the cost of services to assess operational efficiency within each cost center.
- B. Each department is responsible for providing cost recovery performance and reporting to Budget and Research department for a consolidated report to City leadership.
- C. Once cost of service and recovery targets are established, fees should be indexed to inflation (Consumer Price Index and/or Municipal Cost Index) annually unless the City Council directs otherwise based on a finding of special circumstances.



Cost Recovery Update

City Council Budget Work Session
August 14, 2025

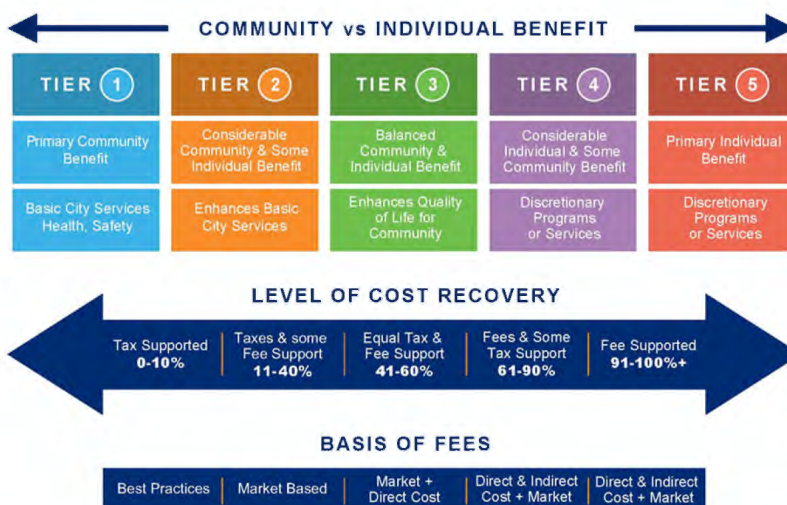
Shelli Siemer, Deputy City Manager

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Cost Recovery Model

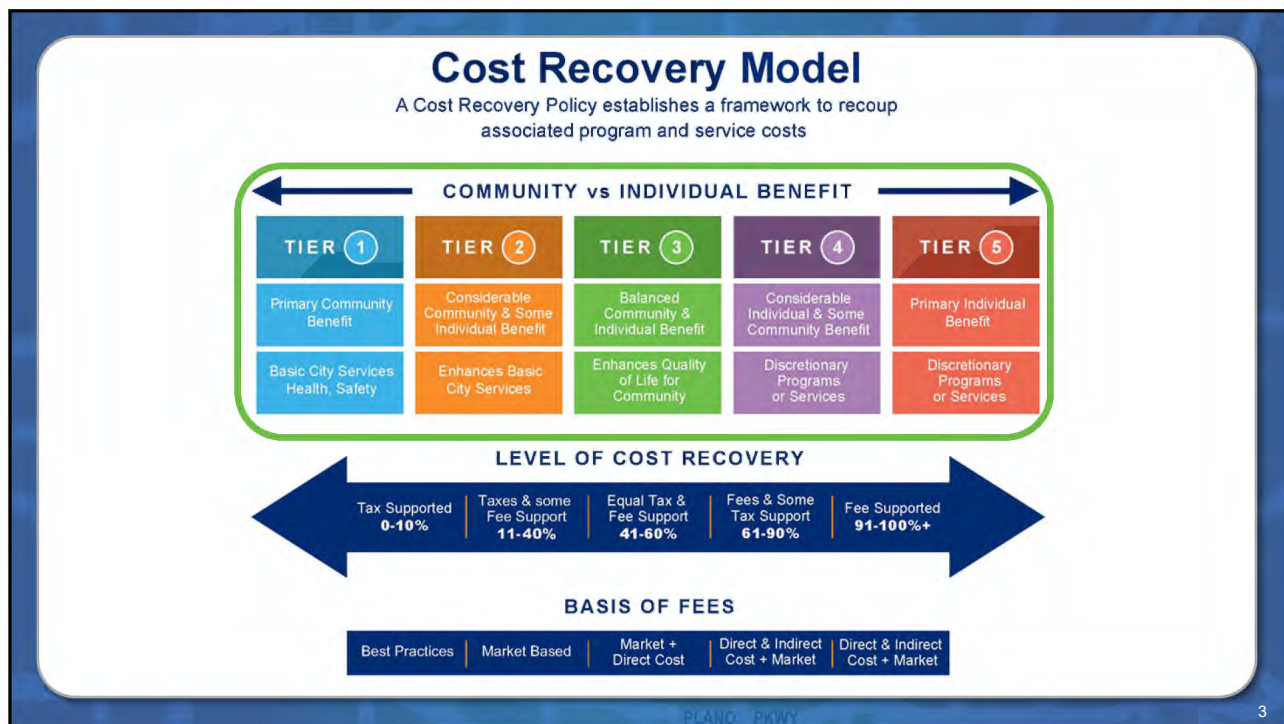
A Cost Recovery Policy establishes a framework to recoup associated program and service costs



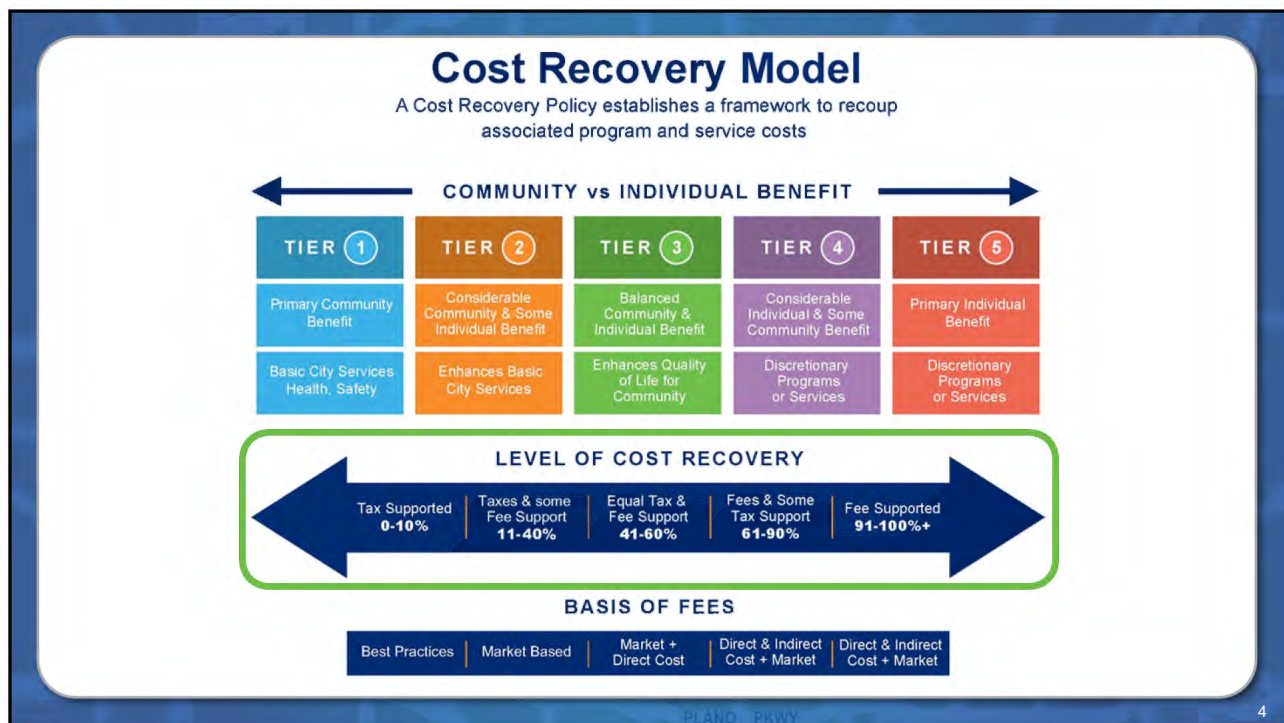
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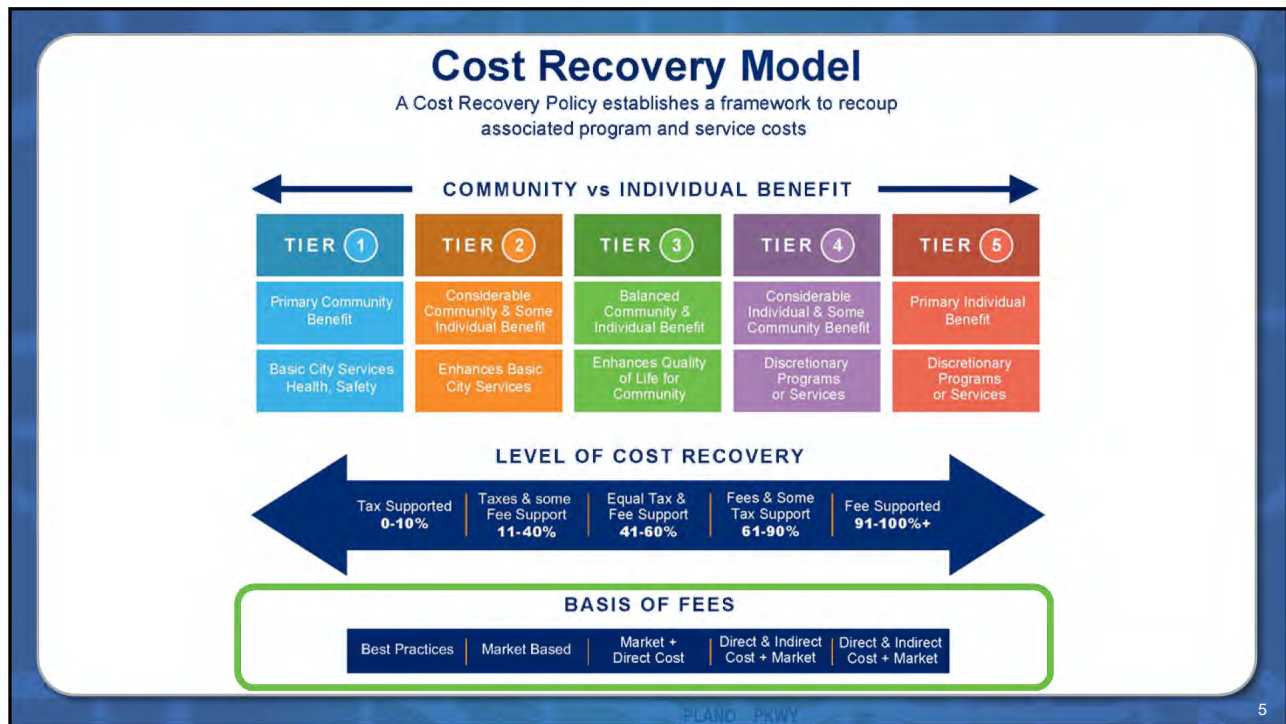
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Cost Recovery Update

Formal Fee Reviews

- Enterprise funds: 3-year rotation
- Departments: 4-year rotation with interim annual reviews
 - Currently: Planning, Engineering, Building Inspections
 - Recommends fee target and amount, fee additions and removals
- City Council Sets Fees

Timeline:

- Sept. 16th - City Council POM
- Oct 13th - City Council Mtg
- **Effective Nov. 1 – FY 25-26**

Budget Work Session - August 14, 2025

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Cost Recovery Update

Interim Fee Adjustments

- Compliance to new policy
- Applies to existing fees not reviewed within last 4 years
- Adjustments based on cumulative CPI but not to exceed 10% increase

Timeline:

Sept. 16th - City Council Mtg

Effective Oct. 1 – FY 25-26

- Animal Services
- Fire
- Neighborhood Services
- PSC – Wireline Fees
- Police – Basic Police Officer Course Tuition
- Public Works

Budget Work Session - August 14, 2025

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Questions | Comments

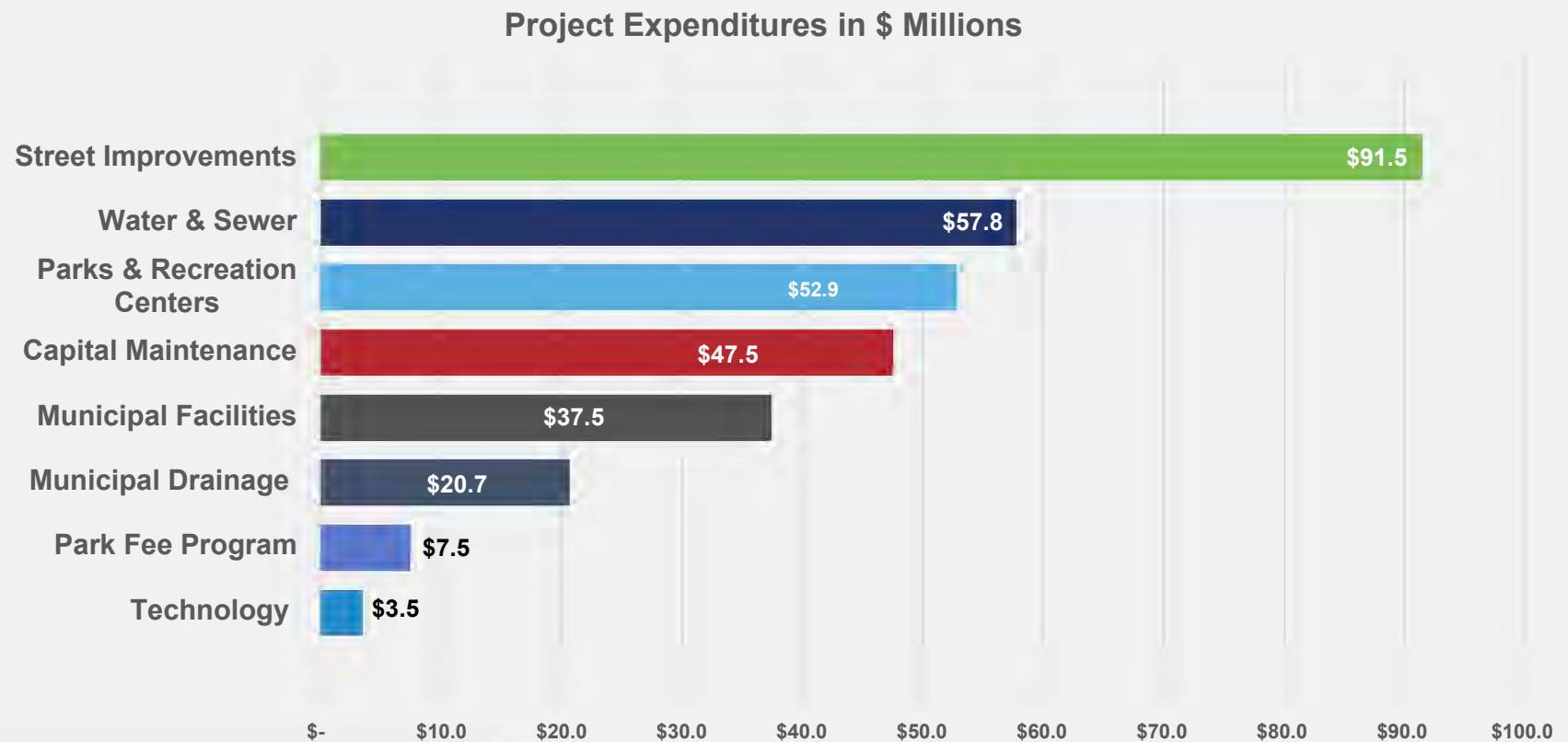
Cost Recovery Update

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Proposed 2025-26 CIP Budget - \$319.0 Million



FY 2025-26 City Manager's Recommended Budget