

PROPOSAL FOR A
WATER & WASTEWATER
CAPACITY FEE STUDY

Prepared for City of Alpine, Wyoming October 10, 2024



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Section A: Cover Letter

October 10, 2024

RE: Proposal for Water and Wastewater Capacity Fee Study

Ms. Chenault:

TischlerBise is pleased to submit this proposal to prepare a Water and Wastewater Capacity Fee Study for the City of Alpine. We bring several distinct advantages to this assignment:

- No other firm has the depth of experience that TischlerBise brings to this assignment. The City will benefit from our staff's experience in identifying funding gaps and creating new revenue programs for hundreds of local government agencies across the country. We have prepared over 1,000 impact fee studies across the country more than any other firm. We are innovators in the field, pioneering approaches for credits, impact fees by size of housing unit, and distance-related/tiered impact fees.
- National Thought Leaders. Our Project Team members for this assignment are considered national thought leaders on the subjects of impact fees, infrastructure financing strategies, and fiscal/economic sustainability. Mr. Bise, AICP, recently Chaired the American Planning Association's Paying for Growth Task Force and was recently named an Affiliate of the National Center for Smart Growth Research & Education. Mr. McAweeney co-authored a contribution to the Journal of Comparative Urban Law and Policy, "The Evolution of Fiscal Impact Analysis and Where it Needs to Go."
- Community Outreach. An important component of a successful impact fee program is community support. All three members of our project team have substantial experience developing and managing public outreach and community relations programs associated with impact fees and infrastructure finance.
- Wyoming Experience. TischlerBise has prepared several impact fee studies in the State of Wyoming, including the City of Cheyenne and Laramie County.
- Responsiveness. As a small firm, we have the flexibility and responsiveness to meet all deadlines for the project. In addition, much of the consulting work on this assignment will take place at our Boise, Idaho office.

Our team looks forward to the possibility of working with the Alpine and is committed to providing costeffective, high-quality support for this assignment.

Sincerely,

Colin McAweeney, Idaho Practice Leader

TischlerBise. Inc.

999 W Main St Suite 100

Boise, ID 83702

Phone: 208-515-7480

E-mail: colin@tischlerbise.com





Section B: Relevant Experience

TischlerBise, Inc., was founded in 1977 as Tischler, Montasser & Associates. The firm became Tischler & Associates, Inc., in 1980 and TischlerBise, Inc., in 2005. The firm is a Subchapter (S) corporation, is incorporated in Washington, D.C., and maintains offices in Bethesda, Maryland and Boise, Idaho.

TischlerBise is a fiscal, economic, and planning consulting firm specializing in fiscal/economic impact analysis, impact fees, user fees, market feasibility, infrastructure financing studies, and related revenue strategies. Our firm has been providing consulting services to public agencies for over forty years. In this time, we have prepared over 900 fiscal/economic impact evaluations and over 1,000 impact fee/infrastructure financing studies – more than any other firm.

TischlerBise has been the national leader in advancing the state of the practice as it relates to impact fee calculations. For example, TischlerBise developed unique methodologies for calculating "progressive" demand indicators for not only persons per housing unit (household), but also the development of jurisdiction-specific average daily vehicle trip generation rates, using US Census Bureau data and Institute of Transportation Engineer's formulas. These methods not only improve proportionality, but also promote housing equity. In addition, TischlerBise has developed unique impact fee methodologies to assist communities with the implementation of land use policies intended to address sprawl, congestion, and other growth management issues by helping to direct growth to planned development zones.

TISCHLERBISE NATIONAL EXPERIENCE

TischlerBise is the national leader in advancing the "state of the practice." For example, TischlerBise pioneered impact fees by housing size and/or bedroom count, tiered transportation fee schedules. While every community is unique, this national experience provides invaluable perspective for our clients. A summary of our national impact fee experience is shown below.

STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
AL	Baldwin County		♦							•			
AL	Daphne		♦					•	•	•			
AL	Fairhope		♦					•	•	•		•	
AL	Foley		♦					•	•	•			
AL	Gulf Shores		*					•	•	•			
AL	Orange Beach		*					•	•	•		•	
AR	Bella Vista						•	•			•		
AR	Bentonville		*	•	*		*	•	*				
AR	Siloam Springs		*					•	•				
AZ	Apache County	•											





STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
AZ	Apache Junction		♦				♦	•	•		•	•	
AZ	Avondale		♦	*	*		•	♦	•		•	•	
AZ	Buckeye		♦	•	♦		♦		♦		•	♦	
AZ	Bullhead City		♦				♦		•			•	
AZ	Camp Verde	•					♦		•		•	•	
AZ	Carefree	•	♦		*					•		•	
AZ	Casa Grande		♦	*			♦	♦	•		•	•	
AZ	Cave Creek		♦	*	*				•	♦		•	
AZ	Coolidge		♦	•			♦	•	•			•	
AZ	Dewey-Humboldt		♦				•	♦	•		•	•	
AZ	El Mirage			•	♦		♦	•	♦			♦	
AZ	Eloy			•	♦		♦		♦		•	♦	
AZ	Flagstaff	•	♦				♦	•	♦		•	♦	
AZ	Fountain Valley		♦					•	♦				
AZ	Gilbert		♦		♦		♦	•			•		
AZ	Glendale			•	♦	•	♦	•	•		•	•	
AZ	Goodyear		♦	•	♦		♦	•	♦		•		
AZ	Holbrook			•	♦								
AZ	Kingman		♦	•	♦		♦		•				
AZ	Lake Havasu City		♦										
AZ	Maricopa	•	♦				♦	•	♦	•	•	•	
AZ	Navajo County	•	♦					•					
AZ	Nogales			•	♦								
AZ	Peoria	•	♦				♦	•	•	•	•	•	
AZ	Phoenix		♦				♦	•	•	•	•		
AZ	Pinal County	•	♦				♦		•				
AZ	Pinetop-Lakeside		♦				♦		•	•		•	
AZ	Prescott	•											
AZ	Queen Creek		♦	•	•		♦	•		♦	♦	•	
AZ	Safford			•	♦								
AZ	San Luis		♦	•	♦	•	♦	•	♦				
AZ	Scottsdale			•	♦								
AZ	Sedona		♦			•	♦		•			•	
AZ	Show Low	•	♦	•	♦		♦		♦		♦		
AZ	Sierra Vista		♦				♦	•	•	•	•		
AZ	Somerton		♦	•	*	•	•	•	•				





STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
AZ	Springerville	•		•	♦								
AZ	Surprise		♦	•	*		♦	•	•		♦	•	
AZ	Taylor	•	♦				♦	•	•			•	
AZ	Tolleson	•	♦	•	*	•	♦	•				•	
AZ	Tucson		•				♦	•	•				
AZ	Wellton		•	•	♦	•	♦	•	•				
AZ	Yuma		♦	•		•	♦	•	•	•		•	
CA	Avenal		♦	•		•	♦	•	•		♦		
CA	Banning		♦				♦	•	•			•	
CA	Butte County		♦				♦	•			♦	•	
CA	Chino Hills		♦	•		•			•				
CA	Clovis			•									
CA	Corcoran			•	♦		♦		•			•	
CA	El Centro						♦	•	•		♦	•	
CA	Grass Valley		♦	♦	♦	•	•	♦	♦			•	
CA	Half Moon Bay		♦	•			♦		♦	♦			
CA	Hemet		♦			•	♦	•	•	•	♦	•	
CA	Imperial County	•											
CA	Mammoth Lakes		♦			•	•		♦	•		•	
CA	Maywood	•											
CA	National City						♦	•	♦		•		
CA	Rancho Cucamonga								•				
CA	Suisun City		♦						•			•	
CA	Temecula		♦	•	♦		♦		•	♦	♦	•	
CA	Tulare		♦	•	♦	•	♦	•	•	♦	♦	•	
CA	Visalia								•		♦	•	
FL	Manatee County		♦				♦	•	♦	♦		•	♦
FL	Manatee County Schools												♦
FL	Miami	•					♦	•	♦	♦		•	♦
FL	Naples	•											
FL	North Miami	•		•	♦		♦	•	♦	♦	♦	•	
FL	Osceola County Schools												♦
FL	Parkland						♦		♦				
FL	Pasco Co. School Board												♦
FL	Pinecrest		♦			•	♦		♦				
FL	Port St. Lucie								•			•	





STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
FL	Punta Gorda		*				♦	•	♦		•	•	
FL	Sarasota County Schools												•
FL	South Miami		•						♦				
FL	Seminole Co. Schools												*
FL	Stuart		•				♦	•	•			•	
FL	West Miami			•			♦		•			•	
GA	Atlanta		•					•	♦	•		•	•
GA	Calhoun	•											
GA	Douglas County	•	♦					•	♦	•		♦	
GA	Douglasville	•	•					•		•			
GA	Effingham County		♦	•	•			♦		•		•	
GA	Forsyth County		♦										
GA	Gordon County	•							♦	•		♦	
GA	Henry County		♦										
GA	Roswell		♦						♦	•			
ID	Caldwell	•											
ID	Canyon County	•											
ID	Driggs		♦				♦	•	♦				
ID	Hailey		•	•	•		♦	•	♦	•	•	•	
ID	Hayden		•				♦		•				
ID	Idaho Falls		♦				♦	•	♦				
ID	Kellogg			•				•		•			
ID	Kootenai Fire/ Rescue								♦				
ID	Nampa	•	•	•	♦			•	♦	•	•		
ID	Post Falls	•	•				♦		♦				
ID	Sandpoint		♦					•	♦	•			
ID	Shoshone Co. Fire Dept							•					
ID	Teton County		•				♦	•	♦				
ID	Victor		•				♦	•	♦				
IL	Evanston	•	•		•					♦		♦	
LA	Covington			•	•								
MD	Anne Arundel		•										•
MD	Brunswick						♦		♦			♦	
MD	Calvert County		•				♦	•					♦
MD	Caroline County												♦
MD	Carroll County					♦		•	♦		•	•	•





STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
MD	Cecil County		♦				♦	•				•	
MD	Charles County		♦						•				•
MD	Dorchester County	•					•						•
MD	Easton	•	♦				•	•	•			•	
MD	Frederick		*										
MD	Frederick County		*				•	•	•		•	•	•
MD	Hagerstown		♦				♦		♦			*	
MD	Hampstead				♦		•		•				
MD	Harford County	•											
MD	Ocean City	•											
MD	Queen Anne's County	•					•	•	•	•	•	•	•
MD	Salisbury	•	♦	•	♦		•	•	•	•		•	
MD	Snow Hill	•					*	•	♦			*	
MD	Talbot	•	*						•		•	*	•
MD	Washington County						•						•
MD	Westminster		♦		*				•			•	•
MD	Wicomico		•										•
MD	Worcester					•			♦		•	•	♦
MT	Belgrade	•	•	•	•			•	•				
MT	Bozeman		•	•	•			•					
MT	Flathead County		•					•					
MT	Florence School District												•
MT	Gallatin County	•	•					•					
MT	Gallatin Co. Fire Districts							•					
MT	Hamilton		♦	•	♦		♦	*					
MT	Livingston		♦	•	♦			•	•				
MT	Missoula		♦				♦		•		•	•	
MT	Missoula County		♦	•			♦	•					
NC	Cabarrus County												♦
NC	Camden County												•
NC	Catawba County												♦
NC	Chatham County												♦
NC	Creedmoor			•	♦								
NC	Currituck County												•
NC	Durham												♦
NC	Greenville		♦					•	•				





STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
NC	Jacksonville	•		•	♦								
NC	Nags Head						•		♦			•	
NC	Orange County								♦	•			•
NC	Pasquotank												•
ND	Minot										•	•	
ND	Minot										•	•	
NM	Las Cruces			•	•								
NV	North Las Vegas	•						•					
NV	Nye County		*			•	•	•	♦				
NV	Washoe County		*										
ОН	Delaware						•	•	♦			•	
ОН	Lebanon		♦						♦				
ОН	Pickerington	•	*				•		♦			•	
ОН	Sunbury						•					•	
RI	East Greenwich							•	♦	•		•	•
RI	Middletown			•			•	•	♦			•	•
SC	Aiken		♦				•	•	♦				
SC	Anderson County		*										
SC	Beaufort County		♦				•	•	•		•		•
SC	Clover School District												•
SC	Easley		•				•	•	•				
SC	Fort Mill School District												•
SC	Georgetown County		*				•				•		
SC	Horry County	•					•	•	♦	•	•		
SC	Jasper County		♦				•	•	♦				•
SC	Lancaster County						•	•	♦				•
SC	Lexington County						•	•					
SC	Richland County		•										
SC	Summerville							•	♦			♦	
SC	Tega Cay			•	•			•	♦				
SC	York County		*				•		♦				
TN	Hendersonville		•				♦	•	♦				
TN	Murfreesboro		•				•	•	♦				
TN	Portland		*				•	•					
TN	Williamson County												♦
UT	Mapleton			•	♦	•		•	♦	•			





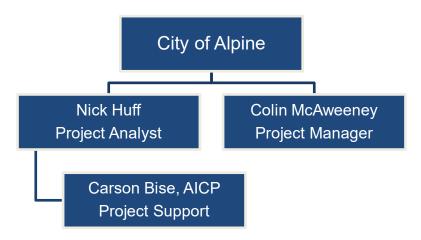
STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
UT	North Logan	•	♦	•	*				•	•			
UT	Pleasant Grove	•	•	•	*		♦	•	•				
UT	Sandy City		•			•	♦	•		•			
UT	Spanish Fork	•		*	*	•			•				
UT	West Jordan		♦	*	♦	•	•	♦	•				
VA	Chesterfield County		♦					•	•		•		•
VA	Goochland County		♦										
VA	Fauquier County		♦					•					♦
VA	Frederick County		♦					•					•
VA	Henrico County		♦						♦		•		•
VA	Isle of Wight County							•	♦				•
VA	Loudoun County		♦				♦	•	♦		•		•
VA	Prince George County						♦	•	•		•	•	•
VA	Prince William County		♦										
VA	Spotsylvania County		♦										
VA	Stafford County		♦										
VA	Suffolk			•	•								
VA	Sussex County	•											
WV	Jefferson County						•	•	•			•	•
WY	Casper	•	•					•	•				
WY	Cheyenne		•				•	•	•			•	•
WY	Laramie County		•										





Section C: Project Team

Our Project Team for this assignment includes our most senior and experienced impact fee professionals. We have unsurpassed experience performing projects requiring the same expertise as that needed to serve the City of Alpine. The role of each team member and their qualifications are briefly discussed in this section, and the organizational chart shows our project team for this assignment.



Colin McAweeney, Western Region Manager, will serve as Project Manager for this assignment. Mr. McAweeney has been with TischlerBise for ten years and is the Project Manager for our Mountain West assignments. Mr. McAweeney heads our Boise office and has prepared over 40 impact fee studies in the region.

Carson Bise, **AICP**, President of TischlerBise, will serve as project support. In this role, Mr. Bise will coordinate our Project Team's interaction with the City to ensure that all work is completed properly, on time, and within budget. He will work closely with Mr. McAweeney and Mr. Huff, developing and reviewing all aspects of the project and providing overall quality assurance for the project.

Nick Huff, Fiscal/Economic Analyst at the Boise, Idaho office. Mr. Huff has been with TischlerBise for two years and has a background before joining TischlerBise in the finance industry.

L. Carson Bise, AICP, President

Carson Bise has 30 years of fiscal, economic and planning experience and has conducted fiscal and infrastructure finance evaluations in 40 states. Mr. Bise has developed and implemented more fiscal impact models than any consultant in the country. The applications which Mr. Bise has developed have been used for evaluating multiple land use scenarios, specific development projects, annexations, urban service provision, tax-increment financing, and concurrency/adequate public facilities monitoring. Mr. Bise is also a leading national figure in the calculation of impact fees,



having completed over 350 impact fee studies. Mr. Bise has also written and lectured extensively on fiscal impact analysis and infrastructure financing. His most recent publications are *Next Generation Transportation Impact Fees* and *Fiscal Impact Analysis: Methodologies for Planners*, both published by the American Planning Association, a chapter on fiscal impact analysis in the book *Planning and Urban Design Standards*, also published by the American Planning Association, and the ICMA IQ Report, *Fiscal Impact*





Analysis: How Today's Decisions Affect Tomorrow's Budgets. Mr. Bise was also the principal author of the fiscal impact analysis component for the Atlanta Regional Commission's Smart Growth Toolkit and is featured in the recently released AICP Training Package entitled The Economics of Density. Mr. Bise is currently on the Board of Directors of the Growth and Infrastructure Finance Consortium and recently Chaired the American Planning Association's Paying for Growth Task Force.



EDUCATION

M.B.A., Economics, Shenandoah University

B.S., Geography/Urban Planning, East Tennessee State University

B.S., Political Science/Urban Studies, East Tennessee State University

SELECTED IMPACT FEE EXPERIENCE

- Apache Junction, Arizona
- · Camp Verde, Arizona
- Eloy, Arizona
- Crested Butte, Colorado
- Erie, Colorado
- Fort Collins, Colorado
- Grand Junction, Colorado
- Longmont, Colorado
- Louisville, Colorado
- Steamboat Springs, Colorado
- Thornton, Colorado
- Vail, Colorado
- Blaine County, Idaho
- Donnelly, Idaho
- Donnelly Fire District, Idaho
- Donnelly, Idaho
- Elmore County, Idaho
- Idaho Falls, Idaho
- Kellogg, Idaho
- Kuna, Idaho
- Anne Arundel County, Maryland
- · Town of Easton, Maryland
- Talbot County, Maryland
- Cheyenne, Wyoming
- Laramie County, Wyoming

SPEAKING ENGAGEMENTS

- Fiscal Impact Assessment, AICP Training Workshop, American Planning Association National Planning Conference
- Dealing with the Cost of Growth: From Soup to Nuts, International City/County Management Association National Conference



- - Demand Numbers for Impact Analysis, National Impact Fee Roundtable
 - Calculating Infrastructure Needs with Fiscal Impact Models, Florida Chapter of the American Planning Association Conference
 - Economic Impact of Home Building, National Impact Fee Roundtable
 - Annexation and Economic Development, American Planning Association National Conference
 - Economics of Density, American Planning Association National Conference
 - The Cost/Benefit of Compact Development Patterns, American Planning Association National Conference

PUBLICATIONS

- "Next Generation Transportation Impact Fees," American Planning Association.
- "Fiscal Impact Analysis: Methodologies for Planners," American Planning Association.
- "Planning and Urban Design Standards," American Planning Association, Contributing Author on Fiscal Impact Analysis.
- "Fiscal Impact Analysis: How Today's Decisions Affect Tomorrow's Budgets," ICMA Press.
- "The Cost/Contribution of Residential Development," Mid-Atlantic Builder.
- "Are Subsidies Worth It?" Economic Development News & Views.
- "Smart Growth and Fiscal Realities," ICMA Getting Smart! Newsletter.
- "The Economics of Density," AICP Training Series, 2005, Training CD-ROM (American Planning Association)

Colin McAweeney, Western Region Manager

Colin McAweeney is the Idaho Practice Leader and manages the Boise, Idaho office, with specialties in finance and economic development planning. Mr. McAweeney is an industry expert regarding the intersection of land use planning and municipal finance. His expertise ranges from project-level impact analysis to regional fiscal model design and programming. Additionally, McAweeney has completed impact fee and user fee studies in 50+ communities and presented at local- and state-level conferences. Mr. McAweeney co-authored a contribution to the Journal of Comparative Urban Law and Policy, "The Evolution of Fiscal Impact Analysis and Where it Needs to Go." Prior to joining TischlerBise, he finished his master's degree with a thesis surrounding the urban aspects that attract investment. Before pursuing his M.S., Mr. McAweeney worked in the finance sector for several years where he became familiar with financial markets and business financing.

EDUCATION

M.S., Urban Management and Development, Erasmus University Rotterdam B.S., Economics with an emphasis on Mathematics, University of Wisconsin – Madison

SELECTED IMPACT FEE EXPERIENCE

- Peoria, Arizona
- Adams County, Colorado
- Fort Collins, Colorado
- Lone Tree, Colorado
- Parker, Colorado
- Ada County, Idaho





- Burley, Idaho
- Driggs, Idaho
- Kellogg, Idaho
- Kootenai County, Idaho
- Idaho Falls, Idaho
- Middleton, Idaho
- Middleton Fire District, Idaho
- Nampa, Idaho
- Payette County, Idaho
- Post Falls, Idaho
- Sandpoint, Idaho
- Teton County, Idaho
- Victor, Idaho
- Bozeman, Montana
- Missoula, Montana
- Whitefish, Montana
- Laramie County, Wyoming

PUBLICATIONS

 "The Evolution of Fiscal Impact Analysis and Where it Needs to Go." Journal of Comparative Urban Law and Policy

Nick Huff, Fiscal/Economic Analyst

Nick Huff is a Fiscal/Economic Analyst at TischlerBise with specialties in finance and accounting. Prior to joining TischlerBise, Mr. Huff completed his B.S. at Boise State University where he specialized in finance. Here, Mr. Huff became knowledgeable in a broad range of financial topics including growth planning, revenue strategy, and investment projections. Prior to joining TischlerBise, Mr. Huff worked for a in the banking industry where he gained experience in risk and asset management.

EDUCATION

B.S., Finance, Boise State University

SELECTED IMPACT FEE EXPERIENCE

- Adams County, Colorado
- Ada County, Idaho
- Burley, Idaho
- Eagle Fire District, Idaho
- Idaho Falls, Idaho
- Middleton, Idaho
- Nampa, Idaho
- Sandpoint, Idaho
- Star Fire District, Idaho
- Bozeman, Montana
- Whitefish, Montana
- Laramie County, Wyoming





Section D: Project Approach and Scope of Services

TASK 1: PROJECT INITIATION/DATA ACQUISITION

During this task, we will meet with City staff to establish lines of communication, review and discuss project goals and expectations related to the project, request data and documentation related to new proposed development, and discuss staff's role in the project. The objectives of this initial discussion are outlined below:

- Obtain and review recent permit data and other land use information for the City
- Review and refine work plan and schedule
- Assess additional information needs and required staff support
- · Identify and collect data and documents relevant to the analysis
- · Identify any relevant policy issues

Meetings:

One (1) on-site visit to meet with City staff as appropriate.

Deliverables:

Data Request Memorandum (prepared in advance of meeting).

TASK 2: PREPARE LAND USE ASSUMPTIONS AND DEVELOPMENT PROJECTIONS

The purpose of this task is to review and understand the current demographics of the City and determine future development for the City in terms of new population, housing units, employment, and nonresidential building area over the next 10-20 years. TischlerBise will prepare a plan that includes projections of changes in land uses, densities, intensities, and population.

Meetings:

Discussions with the Department of Planning and Zoning and other relevant staff held as part of Task 1, as well as conference calls as needed.

Deliverables:

TischlerBise will prepare a draft Technical Memorandum discussing the recommended land use factors and projections. After review and sign-off by the City, a final memorandum will be issued, which will become part of the final Impact Fee Report.

TASK 3: DETERMINE CAPITAL FACILITY NEEDS AND SERVICE LEVELS

This Task as well as Tasks 4-6 may vary somewhat depending on the methodology applied to each impact fee category. The impact fee study for each utility type would be presented in separate chapters in the Impact Fee Report.

Identify Facilities/Costs Eligible for Impact Fee Funding. As an essential part of the nexus analysis, TischlerBise will evaluate the impact of development on the need for additional utility infrastructure and identify costs eligible for impact fee funding. Elements of the analysis include:

- Review facility plans, fixed asset inventories, and other documents establishing the relationship between development and facility needs by type.
- Identify planned facilities, vehicles, equipment, and other capital components eligible for impact fee funding.
- · Prepare forecast of relevant capital facility needs.



Adjust costs as needed to reflect other funding sources.

As part of calculating the impact fee, the City may include the construction contract price; the cost of acquiring land, improvements, materials, and fixtures; the cost for planning, surveying, and engineering fees for services provided for and directly related to the construction system improvement; and debt service charges, if the City might use impact fees es as a revenue stream to pay the principal and interest on bonds, notes or other obligations issued to finance the cost of system improvements. All these components will be considered in developing an equitable allocation of costs.

Identify Appropriate Level of Service (LOS) Standards. We will review needs analyses and LOS for each facility type. Activities related to this Task include:

- Apply defined service standards to data on future development to identify the impacts of development on facility and other capital needs. This will include discussions with staff about the existing versus adopted LOS, as appropriate.
- Ascertain and evaluate the actual demand factors (measures of impact) that generate the need for each type of facility to be addressed in the study.
- Identify actual existing service levels for each facility type. This is typically expressed in the number
 of demand units served.
- Define service standards to be used in the impact fee analysis.
- Determine appropriate geographic service areas (if necessary) for each utility.

Meetings:

Two (2) meetings with City staff to discuss capital facility needs and levels of service.

Deliverables:

Memoranda as appropriate. Results integrated into Draft/Final Impact Fee Report.

TASK 4: CONDUCT FUNDING AND CASHFLOW ANALYSIS

In order to prepare a meaningful capital funding strategy, it is important to not only understand the gross revenues, but also the capital facility costs and any deficits. In this case, some consideration should be given to anticipated funding sources. This calculation will allow the City to better understand the various revenue sources possible and the amount that would be needed if the impact fees were discounted.

The initial cash flow analysis will indicate whether additional funds might be needed or if the funding strategy might need to be changed to have new growth pay its fair share of new capital facilities. This could also affect the total credits calculated in the previous Task. Therefore, it is likely that a number of iterations will be conducted in order to refine the cash flow analysis reflecting the capital improvement needs.

Deliverables:

See Task 5.

TASK 5: PREPARE DRAFT AND FINAL IMPACT FEE REPORT, PUBLIC PRESENTATIONS

TischlerBise will prepare a draft report for the City's review. The report will summarize the need for utility impact fees in the City of Alpine and the relevant methodologies employed in the calculation. It will also document all assumptions and cost factors. The report will include at a minimum the following information:

- Executive summary
- A detailed description of the methodologies used during the study
- A detailed description of all LOS standards and cost factors used and accompanying rationale





- A detailed schedule of all proposed impact fees listed by land use type and activity
- Other information which adequately explains and justifies the resulting recommended impact fee schedule
- Cashflow analysis
- Implementation and administration procedures

Following the City's review of the draft report, we will make mutually agreed upon changes to the impact fee report and issue a final version.

TischlerBise's report will have detail on the methodology and approach, a series of tables for each impact fee category showing all of the data assumptions and figures, and a narrative explaining all of the data assumptions, sources and the methodologies. The report will be a stand-alone document clearly understood by all interested parties. Because of the firm's extensive experience in calculating impact fees and preparing such reports, we have developed a succinct written product that leaves a well-understood paper trail.

Meetings:

One (1) meeting/presentation of the Impact Fee Study with the City Council.

Deliverables:

Draft and Final Impact Fee Study.





Section E: Budget and Schedule

PROJECT SCHEDULE

The table below indicates our proposed schedule for this assignment.

CITY OF ALPINE WATE	CITY OF ALPINE WATER AND WASTEWATER CAPACITY FEE STUDY												
Tasks	Anticipated Dates	Meetings*	Meetings/Deliverables										
Task 1: Project Initiation / Data Acquisition	Month 1	1	Data Request Memorandum										
Task 2: Prepare Land Use Assumptions and Development Projections	Months 1-2	1	Technical Memorandum Outlining Recommended Land Use										
Task 3: Determine Capital Facility Needs and Service Levels	Months 1-3	2	Memoranda as Appropriate										
Task 4: Conduct Funding and Cash Flow Analysis	Month 3	0	See Task 7										
Task 5: Prepare Impact Fee Report, Public Presentation	Month 3	2	Draft and Final Impact Fee Report										

^{*}In some cases it is assumed meetings are held with multiple departments over one (1) trip. For example, Stakeholder meetings can be held on project visits.

PROJECT MANAGEMENT APPROACH

TischlerBise utilizes a project management process which ensures our projects are completed on time and within budget, and, most importantly, they yield results that match our clients' expectations. Our project management plan employs the following principles to mitigate potential risk and result in successful projects:

Risk: Lack of Understanding of Project Goals, Objectives, and Desired Outcomes

Mitigation: We begin by <u>defining</u> the project to be completed. Based on discussions that occur as part of our Project Initiation task Mr. McAweeney will identify the final project goals and objectives in collaboration with City staff, list potential challenges to the process, and develop a plan to ensure successful outcomes and effective communication.

Risk: Schedule Delays

Mitigation: We will <u>plan</u> the project schedule from the outset. As part of the Project Initiation task, Mr. McAweeney will work with City staff to create an agreed-upon timetable to meet the project schedule. Prior to beginning the project, Mr. McAweeney will assign roles that will ensure that the project schedule is met on time and within budget.

• Risk: Technical Complications

Mitigation: We will actively <u>manage</u> the project process. Mr. Bise and Mr. McAweeney have a long history of strong project management skills that are supported by past project successes (we encourage you to contact our references in this regard). Mr. Bise will manage the work in progress, provide guidance and oversight to staff, and be accountable to the City meeting the schedule, budget, and technical requirements of the project.





Risk: Quality Control

Mitigation: We will <u>review</u> all project deliverables and communication through a formal quality assurance process that requires review at the peer level, project manager level, and executive officer level. Prior to the delivery of work products to the City, deliverables will go through a structured quality assurance process involving up to three levels of review and utilizing a checklist tool. The first level involves a peer-to-peer review of work products and computer models. Next, Mr. Bise, assisted by Mr. McAweeney will be responsible for a second set of reviews comparing the work product to the completed quality checklist form.

• Risk: Cost Overruns

Mitigation: The studies will be conducted under a fixed fee arrangement. We typically do not utilize change orders in our work efforts. The potential for a change in budget could occur if the goals, objectives, and expectations as agreed upon in the scope and project management processes shift significantly. The use of the above proactive project management elements is structured to avoid budgetary issues.

PROJECT COST

The following table provides our fixed fee cost proposal for the Impact Fee Study. Our cost proposal is a fixed fee and includes all consulting costs, travel, etc. TischlerBise bills on a percentage complete basis.

FEE SCHEDULE FOR ALPINE WATER AND WASTEWATER CAPACITY FEE STUDY											
Project Team Member:	McAweeney	Huff	Bise	Т	otal						
Job Title:	Manager	Project Analyst	Project Support	Hours	Cost						
Hourly Rate*	\$200	\$180	\$220								
Task 1: Project Initiation / Data Acquisition	8	8	0	16	\$3,040						
Task 2: Prepare Land Use Assumptions and Development Projections	16	16	4	36	\$6,960						
Task 3: Determine Capital Facility Needs and Service Levels	24	16	4	44	\$8,560						
Task 4: Conduct Funding and Cash Flow Analysis	8	8	4	20	\$3,920						
Task 5: Prepare Impact Fee Report, Public Presentation	32	16	4	52	\$10,160						
TOTAL	88	64	16	168	\$32,640						

^{*} Hourly rates are inclusive of all costs.





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