

## Qualifications and References

Last update: June 9, 2023

Accessible electronically at <https://gettinggreatrates.com/>, "Freebies" link

### General

GettingGreatRates, LLC, doing business as GettingGreatRates.com (GGR), was formed by Carl Brown on April 16, 2008, in Missouri as a limited liability company. GGR does *comprehensive utility rate analysis, training and related hands-on assistance. It also produces rate setting spreadsheet templates and written guidance on rates-related issues.* GGR was formed to succeed and broaden services of its forerunner, Carl Brown Consulting, LLC, formed in 2005. GGR operates nationally from a single office in Jefferson City, Missouri. Our NAICS Code is 541618, and is described as, "utilities management consulting services."

### Staff

**Carl Brown** serves as president of GGR.

Mr. Brown graduated from Missouri University in 1977 with a B.S. in Forestry. Through 1989, Mr. Brown managed corporate timberlands, related personnel, contracts and operations. A corporate buyout ended that career.

From 1989 through 1991, Mr. Brown worked as a municipal lease-purchase finance originator with two municipal finance firms.

From 1991 through 1993, Mr. Brown coordinated water and sewer loans and grants with the Water Pollution Control Program of the Missouri Department of Natural Resources (MDNR). In that capacity he served as the user charge rate structure compliance officer for the Clean Water State Revolving Fund (CWSRF) loan program. He developed the pre-cursor to the rate model that is now called, "Rate Assist." This program became the State's template for compliant CWSRF rates.

From 1993 through 2005, Mr. Brown headed the Local Government Assistance Unit in the Technical Assistance Program of MDNR. He developed the "Show-me Ratemaker" program, a do-it-yourself rate calculation spreadsheet. Mr. Brown's unit helped cities and other utility providers solve technical and regulatory compliance problems, with Mr. Brown focusing on financial and rates issues.

In late 2005, Mr. Brown left State employment and launched his water and sewer rate analysis practice. In 2007, he added electric and solid waste rate analyses. In 2013, he added stormwater rate and fee analysis. In 2020, he added fire suppression service rate analysis.

**Mr. Brown has completed 358 rate analyses as of the date above.** He develops rate analysis and related software and guidance materials. That includes the book, "How to Get Great Rates," the "Rate Setting Issues Guide," the "Rate Setting Best Practices Guide," do-it-yourself spreadsheets for calculating the cost and rate impacts of capital improvements and equipment repair and replacement, and dozens of articles on rates-related issues for trade journals. Many of these resources are available at <https://gettinggreatrates.com/>. All are free downloads.



Presenting to 300-1,000 people each year, Mr. Brown trains community leaders and assistance providers all over the U.S. on rate setting, rate analysis, asset management, capital improvement planning, repair and replacement scheduling and other issues related to rate setting. Mr. Brown has trained several rural water associations' staff in how to do basic rate calculations. He built a spreadsheet application and licensed it to those associations, so they can accurately help their member systems set rates appropriately.

**Jacki Hicks**, the firm's vice-president, graduated from Missouri Southern State University with a B.S. in Business Administration, emphasis in accounting, in 1991. She prepares analysis models, especially those for analyses that require complex databases. She performs data entry and quality control. Ms. Hicks has approximately 26 years of experience in accounting, financial assurance and complex spreadsheet and database design. The last ten years have been devoted to rate analysis. She develops substantial components of the rate analysis templates we use.

Disclosure: Mr. Brown and Ms. Hicks have been happily married since 1998.

### **Firm Revenues**

All firm revenues come from doing rate analyses; helping clients adjust user charge rates, fees, and policies; helping wholesale water buyers and sellers arrive at appropriate wholesale rates and avoid or resolve disagreements; creating rate and fee calculation applications; and conducting rate setting workshops and training. Everything we do is related to rate setting.

### **Example Rate Analysis Reports**

A selection of approximately 12 rate analysis report packages from past clients is available at <https://gettinggreatrates.com/> under the "Freebies" link.

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### **Our Client List**

The following is not a "reference list" in the usual sense. I did not ask each client listed if they liked our work and if they would like to be a reference (give us a good review). Instead, I have listed every rate analysis client for the past four-plus years, starting in 2019. My guarantee on every project is that the client will be satisfied with our work, or they do not have to pay us. To-date, all have paid. All projects have been completed on schedule or promptly after clients produced all needed data (clients sometimes gather data slowly and delay project completion). As to fees, except for lawsuit projects, nearly all projects are done on a lump-sum fee basis, so none has gone over budget.

Our client list is presented in two parts; those that came through the "RATES" Programs, listed next; and those that were not covered by a "RATES" Program.

### **The "RATES" Programs**

GGR was chosen by eight rural water associations to serve as the analyst for their "RATES" Programs. *Rate Analysis and Training for Environmental Systems* is a supervised approach to assuredly get great rate analyses at a discount to association member systems. Visit <https://gettinggreatrates.com/> to learn more about the program and its results. As you do your reference checking, you may want to contact the program contacts in those rural water associations first. They have seen my work more often than past clients. They know me quite well. Some have known and worked with me for 25+ years. Other analysts could apply to participate in the RATES Programs. To-date, GGR is the only analyst authorized by the associations to provide services through their programs.

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**Arizona RATES Program**, initiated 1/31/2023, Rural Water Association of Arizona (RWAAZ) – Tamara De Leon-Baeza, Executive Director, (928) 707-3721, [t.deleon@rwaaz.org](mailto:t.deleon@rwaaz.org); Andrew Sandoval, Circuit Rider, (520) 238-2415, [a.sandoval@rwaaz.org](mailto:a.sandoval@rwaaz.org)

- Colorado River Indian Tribes (CRIT), Parker, AZ, water, sanitation, 1,378 connections. Accepted: 4/25/2023. Fee: \$15,482. Jeremiah Brosowske, Utilities Director, (760) 927-5560, [Jeremiah.Brosowske@crit-nsn.gov](mailto:Jeremiah.Brosowske@crit-nsn.gov)
- Gila Bend, AZ, water, sewer, 613 connections. Accepted: 2/28/2023. Fee: \$14,384. Kathy Valenzuela, Town Manager, (928) 683-2255, [kvalenzuela@gilabendaz.org](mailto:kvalenzuela@gilabendaz.org)

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**Colorado RATES Program**, initiated in 2017, Colorado Rural Water Association (CRWA) – Claude Strait, Executive Director, (719) 225-7338, [cstrait@crwa.net](mailto:cstrait@crwa.net)

- Hermosa Sanitation District, Durango, CO, sewer, 1,500 connections. Accepted: 5/15/2023. Fee: \$8,231. Steve Janes, Plant Manager, (970) 759-0185, [hsdsteve96@gmail.com](mailto:hsdsteve96@gmail.com)
- 2022, Divide Water Providers, Inc., Divide, CO, water, 120 connections. Fee: \$5,828. Bryan Johnson, Board Member, (719) 687-6011, ext. 23, [bryan@pkenterprisesinc.com](mailto:bryan@pkenterprisesinc.com)
- 2020, South Fork Water and Sanitation District, South Fork, CO, sewer, 769 equivalent residential units. Fee: \$5,405. Ron Carpenter, District Manager, (719) 873-5860, [sfsan@sfwsd.org](mailto:sfsan@sfwsd.org)
- 2019, Palmer Lake, CO, water, 900 connections. Fee: \$5,887. Dawn Palmer, new Town Administrator/Clerk, [dawn@palmer-lake.org](mailto:dawn@palmer-lake.org), (719) 481-2953. Former contact Valerie Remington, Finance Officer/H.R. Director.

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**Kansas RATES Program**, initiated in 2012, Kansas Rural Water Association (KRWA) – (785) 336-3760, Elmer Ronnebaum, General Manager, [krwa@krwa.net](mailto:krwa@krwa.net); Daryn Martin, Technical Assistant, (316) 621-0314, [dmartin@krwa.net](mailto:dmartin@krwa.net)

- Public Wholesale Water Supply District #25, Lawrence, KS, 2 water connections (water districts). Accepted: 2/23/2023, completed 5/12/2023. Fee: \$6,874. Ron Wyatt, Lead Water Plant Operator, (785) 551-0026, [ron@pw25.org](mailto:ron@pw25.org).

*By e-mail:*

...Carl, you seem to have unending capacity to "get things done". I am impressed.

–Elmer Ronnebaum, General Manager  
Kansas Rural Water Association

- Butler Co, KS, RWD #5, 2,199 water connections. Accepted: 2/2/2023, completed 4/15/2023. Fee: \$7,410. Terry Brown, District Manager, (316) 461-9427, [terrybrown@bucorwd5.com](mailto:terrybrown@bucorwd5.com).
- Douglas Co, KS, RWD #6, 254 water connections. Accepted: 9/30/2021, completed 7/24/2022. Fee: \$6,764. Janette Funk, Clerk, (785) 318-0070, [rwdsix@gmail.com](mailto:rwdsix@gmail.com).
- 2022, Ellsworth, KS (re-engagement for full rate analyses after 2015 and 2019 projects), 1,100 water and sewer connections. Fee: \$14,545. Rusty Varnado, City Administrator, (785) 432-2800, [rvarnado@ellsworthks.net](mailto:rvarnado@ellsworthks.net).
- 2021, Kechi, KS, 670 water and sewer connections. Fee: \$12,794. Kamme Sroufe, City Administrator, (316) 744-3595, [ksroufe@kechiks.gov](mailto:ksroufe@kechiks.gov)

- 2020, Black & Veatch Corporation (engineering consultancy) to update water rate analysis done for Bonner Springs, KS to cover cost of new water treatment plant being planned, 2,815 water connections. Fee: \$2,400. James Winger, P.E., Project Manager, (913) 458-3484, [WingerJG@bv.com](mailto:WingerJG@bv.com)
- 2020, Bonner Springs, KS (re-engagement following 2008 and 2017 analyses due to recent changed conditions), 2,815 water, sewer and stormwater connections. Fee: \$21,173. Tillie LaPlante, Finance Director, (913) 667-1745, [Tilliel@bonnersprings.org](mailto:Tilliel@bonnersprings.org) and Frank Abart, Public Works Director, (913) 441-1961, [fabart@bonnersprings.org](mailto:fabart@bonnersprings.org)
- 2020, Council Grove, KS (re-engagement following 2016 water rate analysis), 1,158 water and sewer connections. Fee: \$11,224. Nick Jones, City Administrator, [citycg@tctelco.net](mailto:citycg@tctelco.net) and Derrick Craige, Water Superintendent, [watercg@tctelco.net](mailto:watercg@tctelco.net), (620) 767-5321
- 2019, Tonganoxie, KS, 1,969 water and sewer connections. Fee: \$11,353. George Brajkovic, City Manager, (913) 845-2620, [gbrajkovic@tonganoxie.org](mailto:gbrajkovic@tonganoxie.org)
- 2019, Ellsworth, KS (re-engagement to assess CIP effects on rates for on-going financial planning following 2014 rate analyses), 1,100 water and sewer connections. Fee: \$3,978. Rusty Vornado, current City Administrator, (785) 432-2800, [rvornado@ellsworthks.net](mailto:rvornado@ellsworthks.net). Scott Moore, former City Administrator.

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**New Mexico RATES Program**, initiated in 2013, New Mexico Rural Water Association (NMRWA) – Bill Conner, Executive Director, (505) 884-1031, [bill@nmrwa.org](mailto:bill@nmrwa.org)

- Dona Ana Mutual Domestic Water Consumers Association, Dona Ana, NM, (re-engagement following 2016 project), 6,229 water and 1,500 sewer connections. Accepted: 12/19/2022. Fee: \$18,949. Jennifer Horton, Executive Director, (575) 526-3491, [jennifer@dawater.org](mailto:jennifer@dawater.org)
- 2022, Ranchos de Placitas Sanitary District, Placitas, NM, (re-engagement following 2014 project), 91 water connections. Fee: \$6,889. Jeffrey Ollendorf, Board Member, (860) 309-6384, [jeffreyllendorf@gmail.com](mailto:jeffreyllendorf@gmail.com)

*Note: Mr. Brown presented his analysis report at the Council meeting before the one referenced in the following comments.*

We received comments from the Mayor and each member of the Council last night. I would sum up the comments as conveying that the Council appreciated the work that Carl and staff put into the preparation of the report and analysis. The honest evaluation of current and future requirements to run the utility in a responsible manner, together with the thoughtfulness of the evaluation of the impacts to customers was critical. It is now the responsibility of staff and the Council to demonstrate to the public that the proposed structure is based on defensible information and (will serve as) a roadmap for the future of the utility.

–Dan Porter, Assistant City Manager  
Tonganoxie, Kansas

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**Nevada RATES Program**, initiated 10/28/2022, Nevada Rural Water Association (NVRWA) – Kevin Baughman, Executive Director, (775) 841-4222, [kevinb@nvrwa.org](mailto:kevinb@nvrwa.org), and Max Sosa, (775) 781-8353, [maxs@NVRWA.ORG](mailto:maxs@NVRWA.ORG)

**Projects:** No rate analyses – yet.

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**North Dakota RATES Program**, initiated in 2013, North Dakota Rural Water Systems Association (NDRWSA) – Eric Volk, Executive Director, (701) 391-5080, [ericvolk@ndrw.org](mailto:ericvolk@ndrw.org)

**Projects:** No rate analyses – yet.

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**Virginia RATES Program**, initiated in 2014, Virginia Rural Water Association (VRWA) – (540) 261-7178, Rebecca Batis, Office Assistant, [email@vrwa.org](mailto:email@vrwa.org), and Mike Ritchie, Executive Director, [mritchie@vrwa.org](mailto:mritchie@vrwa.org)

- Powhatan County Public Works, Powhatan, VA, 121 water and 236 sewer connections. Fee: \$13,969. Ramona Carter [rcarter@powhatanva.gov](mailto:rcarter@powhatanva.gov), Public Works Director and Johnny Melis [jmelis@powhatanva.gov](mailto:jmelis@powhatanva.gov), Utilities Manager, (804) 598-5764
- Waynesboro, VA, by subcontract to Thompson & Litton engineers, 8,900 water and sewer connections. Fee: \$17,832. Michael Jeffries, PE, Senior Project Manager, (540) 633-1897, [mjeffries@t-l.com](mailto:mjeffries@t-l.com); James Powers, Assistant City Engineer, (540) 942-6627, [PowersJH@ci.waynesboro.va.us](mailto:PowersJH@ci.waynesboro.va.us)
- Rocky Mount, VA, 3,000 water and sewer connections. Accepted: 1/19/2023, completed 5/16/2023. Fee: \$12,676. Vincent K. Copenhaver, CPA, Director of Finance, (540) 483-5243, [vcopenhaver@rockymountva.org](mailto:vcopenhaver@rockymountva.org)
- 2022, Chincoteague, VA, 3,556 water connections. Fee: \$4,076. Harvey Spurlock, Public Works Director, [harvey@chincoteague-va.gov](mailto:harvey@chincoteague-va.gov), (757) 336-3366
- 2020, Dinwiddie County Water Authority, North Dinwiddie, VA (re-engagement following 2015 rate analyses), 3,200 water and sewer connections. Fee: \$18,168. Brandon Luebbers, Office Manager, (804) 861-0998, [bluebbers@dcwa.org](mailto:bluebbers@dcwa.org)
- 2020, Richlands, VA, 2,550 water and sewer connections, several major wholesale customers. Fee: \$16,465. Timothy Taylor, Utilities Director, (276) 701-2885, [ttaylor@richlands-va.gov](mailto:ttaylor@richlands-va.gov), and Adrienne Cordle, Director of Finance, (276) 964-2566, [acordle@richlands-va.gov](mailto:acordle@richlands-va.gov)
- 2020, Prince George County, VA (re-engagement after 2017 analysis due to changed conditions), 3,200 water and sewer connections. Fee: \$16,654. Frank Haltom, P.E., (new) Director of Engineering and Utilities, (804) 722-8688, [FHaltom@princegeorgecountyva.gov](mailto:FHaltom@princegeorgecountyva.gov)

*By e-mail response from the Finance Director after sending him the Rocky Mount, VA final rate analysis report:*

Thanks Carl,

It has certainly been a pleasure to work with you during the past several months! I really appreciate your years of experience with these types of studies and your expertise in the arena of utility rates. Please do not hesitate to use our locality as a reference for any future localities or utility systems that may require this type of analysis.

Thanks again!  
Vincent

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**Wyoming RATES Program**, initiated in 2013, Wyoming Association of Rural Water Systems (WARWS) – Kathy Weinsaft, Training Specialist, (307) 436-8636, [kweinsaft@warws.com](mailto:kweinsaft@warws.com)

- Northwest Rural Water District, Cody, WY, 450 water and sewer connections. Accepted: 3/28/2023. Fee: \$15,748. Will Newbold, Project Engineer, (307) 655-2283, [ranengineer@ranchesterwy.gov](mailto:ranengineer@ranchesterwy.gov)



- Rancheater, WY, 450 water and sewer connections. Accepted: 2/1/2023. Fee: \$15,748. Will Newbold, Project Engineer, (307) 655-2283, [ranengineer@rancheaterwy.gov](mailto:ranengineer@rancheaterwy.gov)
- 2022, Rawlins, WY, 3,662 water connections. Fee: \$10,237. The City's collection system for its primary water source (springs) failed. This analysis supports replacement of that system. Shawn Metcalf, City Manager, (307) 328-4500, [smetcalf@rawlinswy.gov](mailto:smetcalf@rawlinswy.gov) and Austin Gilbert, P.E., City Engineer, (709) 722-4822, [agilbert@rawlinswy.gov](mailto:agilbert@rawlinswy.gov)
- 2022, Byron, WY, 224 water and sewer connections. Fee: \$13,781. Misty Turnupseed, Clerk/Treasurer, (307) 548-7490, [clerk.treasurer@byronwyoming.org](mailto:clerk.treasurer@byronwyoming.org)
- 2022, Mountain View, WY (re-engagement after 2014 analyses), 700 water and sewer connections. Fee: \$12,218. Penny Robbins, Clerk/Treasurer, (307) 782-3100, [admin@mtvwvy.com](mailto:admin@mtvwvy.com)
- 2022, Skyline Ranch Improvement & Service District, Jackson, WY, 91 water connections. Fee: \$7,342. Jim Lewis [jamesl5546@gmail.com](mailto:jamesl5546@gmail.com), Treasurer, (307) 413-0829.
- 2020, 3 Creek, a subdivision a few miles out of Jackson, WY, 142 water and sewer connections. Fee: hourly. 3 Creek is disputing rates assessed by Jackson, its water and sewer service provider. Laurie Stern, Associate Attorney, Wylie Baker LLP, Jackson, WY; and Tina Korpi, Grand Teton Property Management (3 Creek)
- 2019, Northern Arapaho Water and Sewer Department (Wind River Indian Reservation), Ethete, WY, approximately 650 water connections – in some ways, this is a new system start-up totaling almost \$18M in system construction. GGR worked by subcontract to Argonne National Laboratories (ANL) to initiate rates and management of this system. Fee: \$10,030. ANL contact: Mary Picel, (630) 252-7669, [mpicel@anl.gov](mailto:mpicel@anl.gov)
- 2019, Wardwell Water and Sewer District, Mills, WY, 1,584 water and sewer connections. Fee: \$11,030. Gloria Brainard, District Manager, (307) 265-7034, [wardwellwater@gmail.com](mailto:wardwellwater@gmail.com)
- 2019, Riverton, WY, 3,500 water and sewer connections, sanitation, 3,500 customers. Fee: \$17,973. Tony Tolstedt, City Administrator, (307) 857-7705, [ttolstedt@rivertonwy.gov](mailto:ttolstedt@rivertonwy.gov). (Note: Mr. Tolsted hired my firm previously when he was City Administrator for Douglas, WY, listed next. He soon moved to Riverton and subsequently hired my firm again for his new employer. Thus, this was a re-engagement for the same City Administrator, but for different cities.)

*Said in an e-mail from this board member of Skyline Improvement & Service District to Mark Pepper, Executive Director of the Wyoming Association of Rural Water Systems:*

Hi Mark-  
I'm Jim Lewis, Skyline ISD, and I know that Kathy, and you, recommended that we engage Carl Brown for a Water Rate Analysis, which we did earlier this summer. I've been working with Carl these past couple of months and we're almost to the final, final, report. His approach and methodology is breathtakingly thorough and provides us with a road map on how we should fund our needed capital improvements and associated future debt service & reserve build-up over the next 10 years. I wish we had become members of the Association much earlier.  
Sincerely,  
Jim Lewis

Carl, I have known and worked with you for more decades than I suspect either of us would care to admit. You still amaze me. Thank you from the bottom of my heart. I always learn from you, and you make me a better TA provider for it.  
–Kathy Weinsaft,  
WARWS Training Specialist

*(Said in response to my showing Kathy how to calculate rates for a WARWS member system she was helping.)*

- 2019, Douglas, WY, 2,500 water and sewer connections; sanitation and landfill, 2,500 customers plus outside haulers. Fee: \$23,226. Karen Rimmer, City Clerk, (307) 358-3462, [krimmer@cityofdouglas.org](mailto:krimmer@cityofdouglas.org); and Mary Nichol, Treasurer, [mnicol@cityofdouglas.org](mailto:mnicol@cityofdouglas.org)

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### Projects Outside of the RATES Programs

- Rogersville, MO, 1,500 water and sewer connections. Accepted: 3/9/2023. Fee: \$17,651. Chad Bybee, City Administrator, (417) 540-1486, [cbybee@rogersvillemo.org](mailto:cbybee@rogersvillemo.org).
- Cape Girardeau, MO, 18,000 water connections. Accepted: 1/13/2023. Fee: \$18,457. Casey Brunke, P.E., Assistant Public Works Director, (573) 339-6351, [cbrunke@cityofcapегirardeau.org](mailto:cbrunke@cityofcapегirardeau.org); Erica Bogenpohl, Local Manager, Alliance Water Resources (contract operations firm for Cape), (573) 339-6609, [ebogenpohl@alliancewater.com](mailto:ebogenpohl@alliancewater.com).
- Jefferson Co, MO Public Sewer District, Crystal City and Festus, MO, 8,500 sewer connections. Accepted: 1/6/2023. The cities and District are jointly my "client." The cities are considering selling their sewer systems to the District. This analysis will determine the rates and fees the District would likely assess to the now-current city customers, should the sale occur, and it will calculate payments that may be made by the District to the cities for their systems. (This engagement follows 2018 water and sewer rate analyses, then done separately for the District and Crystal City.) Fee: the base is \$23,681, with possible hourly work and additional advisement later. Douglas Bjornstad, P. E., District Manager/Engineer, (636) 797-9900, [dbjornstad@jeffcopsd.org](mailto:dbjornstad@jeffcopsd.org).
- Normal, IL, 17,402 water connections, development of an industrial water rates calculation model for town staff use to set industrial rates. The town later added comprehensive water rate analysis (all rates) to the project. (This engagement follows 2007 water and sewer rate analyses for the town.) Accepted: 9/1/2021, completed 5/12/2023. Fee: \$18,741. Andrew Huhn, Finance Director, (309) 454-9742, [ahuhn@normal.org](mailto:ahuhn@normal.org)
- 2021, Fort Mojave Tribal Utilities Authority, Mohave Valley, AZ, 1,500 water connections. (This engagement followed 2011 analyses for the Authority.) Fee: \$10,039. Jan Christopher, Accounting Manager, (928) 768-2200, [jchristopher@FMTUA.com](mailto:jchristopher@FMTUA.com)
- 2020, East Central Missouri Water and Sewer Authority (ECM). ECM is owned by Public Water Supply District #2, St. Charles County, MO. (This is a follow-on project to a 2017 analysis for PWSD #2.) Sewer, 2,002 connections. Fee: \$7,798. Kevin Dunn, General Manager, (636) 561-3737, [kdunn@waterdistrict2.com](mailto:kdunn@waterdistrict2.com)
- 2020, Hillsboro, MO, 1,200 water and sewer connections. (This engagement followed analyses in 2006 and 2011.) Fee: \$14,675. Jesse Wallis, City Administrator/City Clerk, (636) 797-3334, [administrator@hillsboromo.org](mailto:administrator@hillsboromo.org)
- 2019, Ava, MO, 1,550 water and sewer connections. (This was the third round of water analyses and the first sewer rate analysis for Ava.) Fee: \$14,124. Peggy Porter, Administration Director/Treasurer, (417) 683-5516, [pporter@avamissouri.org](mailto:pporter@avamissouri.org)

Carl, I would like to thank you for your assistance in resolving our conflict with the City of King (Brookcliff's supplier) over water and sewer rates. Your detailed report helped us make our case.

Mike Cashion  
MRC Homes, Inc. (Brookcliff)

Note: The City settled a lawsuit in a sealed agreement following submission of GGR's analysis report.

- 2019, Kimberling City, MO, 1,435 sewer connections. (This engagement follows an analysis in 2010.) Fee: \$8,732. Jerry Harman, City Administrator, (417) 739-4903, [administrator@ckmo.com](mailto:administrator@ckmo.com)

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Mr. Brown provides training on rates-related issues.

### Workshop and Event References

#### Scheduled Events:

- June 13, 2023, ESRI conference, session on asset management and rate setting, co-trained with Arnab Bhowmick, CEO of Aktivov Asset Management

#### Completed Events:

- Full-day sessions on asset management and rate setting, co-trained with Arnab Bhowmick, CEO of Aktivov Asset Management, for the following rural water association conferences in 2023: Arizona, May 25; Wyoming, April 20; Virginia, April 17 (by Zoom); New Mexico, April 6; Colorado, April 4; Kansas, March 28;
- *March 13, 2023 (by Teams), in-service staff training for RWAAZ in rate calculation principles and methods, and how to use the "Basic Rate Calculations Workbook" I created for them*
- February 14 (by Zoom), Evergreen Rural Water Association (Washington), "Excellent Asset Management and Great Rate Setting," presented with Arnab Bhowmick, Aktivov Asset Management
- September 20 and October 4, 2022 (by Zoom), "Excellent Asset Management and Great Rate Setting" over two sessions, VRWA on-line workshop, presented with Arnab Bhowmick, Aktivov Asset Management
- August 31, 2022 (by Zoom), "Excellent Asset Management and Great Rate Setting" session, Evergreen Rural Water Association (Washington) on-line training, presented with Arnab Bhowmick, Aktivov Asset Management
- July 20, 2022 (by Zoom), "Rate Setting" session, WARWS mini-conference at Thermopolis
- June 15, 2022, "Excellent Asset Management and Great Rate Setting" session, NMRWA annual conference, presented with Arnab Bhowmick, Aktivov Asset Management
- May 24, 2022 (by Zoom), "Asset Management and Rate Setting Partnership" session, WARWS mini-conference, presented with Arnab Bhowmick, Aktivov Asset Management
- April 20, 2022, "Excellent Asset Management and Great Rate Setting" session, WARWS annual conference, presented with Arnab Bhowmick, Aktivov Asset Management; and April 21 rate setting session presented with Kathy Weinsaft, Training Coordinator, WARWS
- March 29, 2022, "Excellent Asset Management and Great Rate Setting" pre-conference workshop, KRWA annual conference, presented with Arnab Bhowmick, Aktivov Asset Management
- *March 1, 2022 (by Zoom), in-service staff training for VRWA in rate calculation principles and methods, and how to use the "Basic Rate Calculations Workbook" I created for them*
- February 9, 2022 (by GoToWebinar), "Excellent Asset Management and Great Rate Setting" workshop, Evergreen (Washington) Rural Water Association annual conference, presented with Arnab Bhowmick, Aktivov Asset Management



- December 14, 2021 (by Zoom), “Excellent Asset Management and Great Rate Setting” workshop, second session, WARWS, presented with Arnab Bhowmick, Aktivov Asset Management
- November 30, 2021 (by Zoom), “Excellent Asset Management and Great Rate Setting” workshop, first session, WARWS, presented with Arnab Bhowmick, Aktivov Asset Management
- *April 12, 2021 (by Zoom), in-service staff training for NMRWA in rate calculation principles and methods, how to use the “Basic Rate Calculations Workbook” I created for them and how to do repair and replacement and capital improvements planning, also using workbooks I created*
- March 25, 2021 (by Zoom), “What Lenders Want” session, WARWS
- *March 8, 2021 (by GoToWebinar), in-service staff training for KRWA in rate calculation principles and methods, how to use the “Basic Rate Calculations Workbook” I created for them and how to do repair and replacement and capital improvements planning, also using workbooks I created*
- January 14, 2021 (by Zoom), Repair and Replacement, and capital improvements planning training, VRWA
- December 1, 2020 (by Zoom), “COVID-19 and Sustainability” and “Rate Setting” sessions, WARWS virtual mini-conference
- November 18, 2020 (by Teams), “Financial Impacts of COVID-19” session, WARWS virtual conference
- October 27, 2020 (by Zoom), “Rates in the Age of COVID” session, WARWS virtual conference
- September 10, 2020 (by Zoom), Repair and Replacement, and capital improvements planning, VRWA
- August 27, 2020 (by Teams), Asset Management for WARWS fall conference, Casper, WY
- August 11, 12, 2020 (by Zoom), Rate Setting Issues for WARWS mini conference, Evanston, WY
- July 29, 2020 (by Zoom), “Sustainability in the Time of COVID,” WARWS mini conference, Pinedale, WY
- July 28, 2020 (by GoToWebinar), Repair and Replacement, and capital improvements planning training, KRWA
- June 11 and June 18, 2020 (by Zoom), sustainable utilities for the New Jersey water association
- *June 1, 2020 (by GoToWebinar), in-service staff training on rate setting, repair and replacement scheduling and capital improvements planning for National Rural Water Association*
- May 21, 2020 (by Zoom), member workshop on rate setting for WARWS
- *May 22, 2020 (by Zoom), in-service staff training for WARWS in rate calculation principles and methods, how to use the “Basic Rate Calculations Workbook” I created for them and how to do repair and replacement and capital improvements planning, also using workbooks I created*
- April 23 and May 7, 2020 (by Zoom), workshops on sustainable utilities for the Wyoming and New Jersey water associations

Carl, one of the things that I have learned from working with Native Americans is that if you want people to remember a concept, tell them a story. You do that intuitively and it is only one of the many things I like about your teaching style.

–Kathy Weinsaft,  
WARWS Training Specialist

- April 18 and 19, 2019, rate setting, R&R and CIP sessions, WARWS annual conference
- April 8-10, 2019, rate setting, R&R and CIP planning sessions, NMRWA annual conference
- March 26 and 27, 2019, rate setting, R&R and CIP sessions, KRWA annual conference
- February 11, 2019, rate setting session, CRWA annual conference
- February 13 and 14, 2019, rate setting sessions, NDRWSA annual conference

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### Publications and Resource Development

Mr. Brown writes guidance and software programs. All free items are available at <https://gettinggreatrates.com/>, under the “Freebies” link. (The rate setting book is a free download, but it can be purchased in hard copy by calling us.) Example resources:

- “Rate Setting Best Practices Guide©” – covers rate setting dos and don’ts, myths and truths; latest update February, 2021.
- “Rate Setting Issues Guide©” – a companion to “How to Get Great Rates” book, first posted November, 2018; latest update January, 2019.
- “How to Get Great Rates©” – a book on rate setting for community and system leaders, second printing August, 2010.
- “Ratepayer’s Survival Guide©” – a guide for ratepayers (and systems) that shows what they can do to foster fair and adequate utility rates.
- “Rate Analyst Guide©” – a guide to show utilities why, when and how to solicit and select rate analysts.
- “Replacement Scheduler©” – a spreadsheet for scheduling equipment repairs and replacements that calculates the annual annuity needed to pay for them.
- “CIP Planner©” – a spreadsheet for scheduling capital improvements, how they will be paid for (loans, grants, etc.) and the annual cash needed to fund the program.
- “Basic Rate Calculation Worksheet©” – a spreadsheet for the RATES Program water associations to use to calculate simple rates for member systems. Note: This application is licensed to these associations for use by only their staff.

