

City of Hollywood



As pictured here, recently Raftelis staff volunteered for a non-profit organization, Hands on Broward, Florida. The project is called Project ROC! (Reclaim our Coastlines). The team removed invasive plants and installed native plants that will discourage beach erosion. It will also encourage a habitat for the sea turtle nesting, food for pollinators, and way-stations for migratory birds. We also did a clean sweep on the beach.



Raftelis is registered with the U.S. Securities Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) as a Municipal Advisor.

Registration as a Municipal Advisor is a requirement under the Dodd-Frank Wall Street Reform and Consumer Protection Act. All firms that provide financial forecasts that include assumptions about the size, timing, and terms for possible future debt issues, as well as debt issuance support services for specific proposed bond issues, including bond feasibility studies and coverage forecasts, must be registered with the SEC and MSRB to legally provide financial opinions and advice. Raftelis' registration as a Municipal Advisor means our clients can be confident that Raftelis is fully qualified and capable of providing financial advice related to all aspects of utility financial planning in compliance with the applicable regulations of the SEC and the MSRB.



February 18, 2019

City of Hollywood
Mr. Paul Bassar, Director of Procurement
c/o: Office of City Clerk
2600 Hollywood Blvd., Rm#: 221
Hollywood, FL 33020

RE: Development Impact Fee Calculation Reports and Consulting Request for Qualifications (RFQ-4604-19-PB)

Dear Mr. Bassar:

Raftelis has assembled a premier consultant team, with in-house, innovative thought leaders and three subcontractors specializing in mobility, transportation, and land use planning. We are pleased to provide our qualifications for the City of Hollywood's (City) impact fee studies. Raftelis has a large national consulting practice that has helped public sector clients with their finances for over 25 years. We have more than 80 consultants, with an office in the Orlando area. I will direct the project, drawing upon more than 20 years of financial consulting experience and utilizing the extensive impact fee experience of our Orlando staff. For this assignment, we will also bring in our Project Manager from Scottsdale, AZ, who is uniquely qualified to manage this complex study. Dr. Dwayne Guthrie, PhD, AICP was a long-time Florida resident and recently served as Manatee County's Impact Fee Manager. He is a national expert who has prepared impact fees for approximately 160 local governments in 27 states, including impact fee studies for Miami, Manatee County, Coral Gables, Stuart, and Port St. Lucie. Together, we collaboratively assist stakeholders and government leaders to make wise fiscal choices based on best practices for impact fees, infrastructure funding, placemaking, and growth management. Raftelis will be responsible for project management and four impact fees (general government buildings, law enforcement, fire rescue, and parks/recreation).

In addition to Raftelis, we are excited to team with NUE Urban Concepts (NUC), who will be primarily responsible for the mobility/transportation fee. Jonathan B. Paul, AICP, is the Principal of NUE Urban Concepts, LLC (NUC), founded in 2011 to assist local governments with developing innovative land use concepts, mobility plans, and parking strategies. NUC reimagines existing transportation networks to support all modes of travel through complete street designs, establishing creative techniques to fund mobility, and accessibility improvements.

Our second subcontractor, ESRP Corporation has in-depth knowledge of Florida Department of Transportation models and the transportation challenges that Hollywood may face in the future. ESRP will find opportunities and develop strategies that allow the creation of balanced, feasible, and effective mobility solutions. ESRP's President, Alex Anaya, PE, PTOE will use a Systems-Engineering approach, focused on understanding and satisfying the needs of the stakeholders, while maintaining a holistic view of the various elements and factors that influence mobility.

Murphy Planning is our third subcontractor. Jerry Murphy, JD, AICP, CFM is a legal scholar and Associate Research Scientist with the University of Florida's (UF) Resilient Communities Initiative. Murphy is also Chair of the Growth & Infrastructure Consortium, successor organization to the National Impact Fee Roundtable, which functions to inform impact fee and infrastructure finance professionals on the latest legal and practice developments. Drawing upon expertise from UF's Shimberg Center for Housing Studies, Murphy will lead on affordable housing strategies, relevant ordinance and policy drafting, and assist with citizen/stakeholder engagement. Shimberg Center's mission is to promote safe, decent, and affordable housing.

We appreciate the opportunity to submit our qualifications for the City of Hollywood's impact fee study. If you have any questions about this proposal, please contact us using the following contact information:

Tony Hairston, Project Director
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Dwayne Guthrie, PhD, AICP, Project Manager
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Sincerely,



Tony Hairston
Vice President



Dwayne Guthrie, PhD, AICP
Manager

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Management Plan

For the City of Hollywood, Raftelis will be the prime contractor, coordinating work efforts with three subcontractors. Raftelis will handle project management and citizen/stakeholder engagement for the impact fee study. Tony Hairston (Raftelis Vice President, Orlando office) will be the Project Director. Dwayne Guthrie (Raftelis Manager, Scottsdale office) will be the overall Project Manager. Joe Williams (Raftelis Senior Consultant, Orlando office) will be primarily responsible for General Government Buildings, Law Enforcement, Fire Rescue, and Parks/Recreation impact fees.

In 2017, our Project Manager served as the Impact Fee Manager for Manatee County Florida, which provided an immersion in the realities of impact fee administration and implementation. During his public-sector service, Dr. Guthrie drafted changes needed to make County ordinances consistent with the updated impact fee study. He also spearheaded adoption of the Impact Fee Procedures Manual that addresses complex administrative issues, such as developer agreements and credits for system improvements. Our impact fee studies will be more than stand-alone reports. Our consultant team will provide multi-faceted and integrated products that connect transportation with land use and a realistic funding strategy.

Jonathan Paul (Nue Urban Concepts) and Alex Anaya (ESRP Corporation) are jointly responsible for the mobility/transportation fees. Jonathan has extensive experience preparing transportation and mobility plans/fees throughout Florida. Alex will assist with technical aspects of the transportation/mobility fees, such as transportation modeling.

NUE Urban Concepts, LLC (NUC) was founded in 2011 to assist local governments with developing innovative land use concepts, mobility plans, and parking strategies, reimagining existing transportation networks to support all modes of travel through complete and shared street design, and establishing creative techniques, like mobility fees, to fund mobility and accessibility improvements. As a small business owner, the Principal of NUC understands the impact of government regulations, fees, and plans on local businesses and works with each community to ensure, to the maximum extent feasible, that any regulation, fee, or plan is mindful of its impact to “mom and pop” operations and small businesses. NUC also believes in transparency and helping community stakeholders, development interests, and elected officials

understand how regulations, plans, and fees are developed and why they are necessary to maintain and enhance the quality of life in the community. With offices in Bradenton, Gainesville, Sarasota, St. Petersburg, Tampa, and West Palm Beach, NUC works with local governments throughout Florida offering a broad range of planning services, including:

- Transportation Master Plans, Mobility Plans and Mobility Fees;
- Complete Street and Shared Street Designs and Standards;
- Comprehensive Plan Amendments & Reviews;
- Land Development Code Updates, including Sign Codes;
- Traditional Neighborhood, Transit Oriented and Trail Oriented standards and policies;
- Traffic Impact Analysis, Parking Studies, Impact Fees & Corridor Studies;
- Concurrency/Level-of-Service (LOS) Analyses & Multimodal Capacity Evaluations;
- Bicycle/Pedestrian/Trail Master Plans; and

ESRP Corporation has extensive experience in multi-modal feasibility/justification studies, corridor studies, goods-movement studies, and large-area transportation analyses intended to find the best combination of improvements, travel-demand management initiatives, and traffic-operations strategies to achieve the best results for all transportation-infrastructure users (including pedestrians and bicyclists). ESRP has been involved in many projects that analyzed existing, mid-term, and long-term traffic conditions. ESRP has in-depth knowledge of transportation networks/models and the transportation challenges that Hollywood may face in the future. This knowledge will be instrumental to find opportunities and develop strategies that allow the creation of balanced, feasible, and effective mobility solutions.

ESRP staff experience includes alternative impact fee studies for unique development projects in several southwest Florida cities and counties. The main objective of these studies was to develop transportation impact fees, based on local data, as an alternative to published fees. These studies require significant traffic data collection and origin-destination surveys as well as average trip-length estimation based on specific land uses. ESRP thoroughly understands the importance of providing complete streets and the mobility advantages of implementing context-sensitive solutions. The Florida Department of Transportation recently implemented a Context Classification System that can be used to evaluate the

adequacy of proposed improvements based on surrounding land-use characteristics.

Jerry Murphy (Murphy Planning and University of Florida Resilient Communities Initiative) will assist with citizen/stakeholder engagement for the impact fee study and lead the affordable housing aspect of the project. Murphy is a legal scholar and urban and regional planner with extensive Florida experience. In concert with City staff, Murphy will partner with the University of Florida Shimberg Center for Housing Studies to develop affordable housing strategies based on best practices options (e.g., supply side alternatives and pros/cons of an affordable housing fee). He will also work on concurrency transition issues and proposed changes to land use plans/regulations. As a member of the Board of Directors for the National Impact Fee Roundtable, since its inception, and its successor organization, the Growth and Infrastructure Consortium (GIC), Mr. Murphy is an acknowledged expert on national practices and legal principles applicable to impact fees and infrastructure funding. He has presented to national audiences on numerous occasions, currently serves as the Chair for GIC, and continues to be directly involved in the evolution of impact fee practice.

Current and Projected Workloads

Raftelis has more than 80 consultants providing a variety of professional services. Regarding impact fees, Raftelis recently completed updates in Goodyear and Gilbert, Arizona. Raftelis is wrapping up impact fee assignments in Buckeye and Prescott, Arizona, Meridian, Idaho, and Punta Gorda, Florida. Raftelis recently started impact fee assignments in the Town of Berthoud and Eagle County, Colorado.

NUC is in the process of finishing the Mobility Fee for Miami Beach and the Mobility Plan/Fees for Palm Beach Gardens, West Palm Beach, and DeBary. NUC currently has an ongoing consultant contract with Sarasota County to assist with Impact Fees and Mobility Fees that will run until October 2019. NUC recently started a continuous service contract with the City of Bradenton to develop a Mobility Plan/Fee and update its Land Development Code. NUC will start on the second phase of the Tallahassee/Leon County Alternative Mobility Funding System Study in 2019. NUC is working on parking management strategies for St. Augustine.

ESRP and Murphy Planning are not currently working on impact fees.

Raftelis and all subcontractors can accommodate Hollywood's workload during the next year.



Project Approach

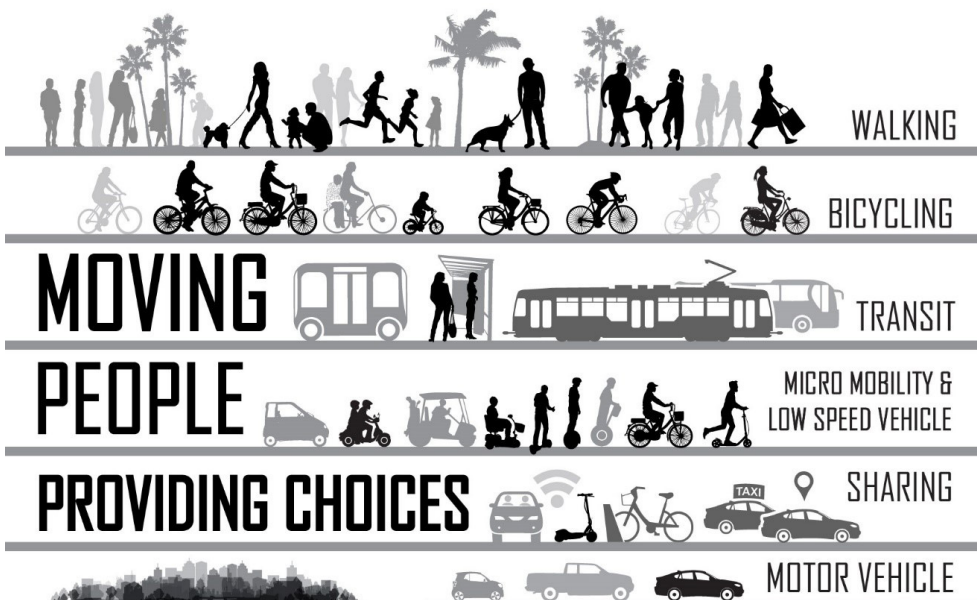
The City of Hollywood (City) will likely continue to grow due to infill and vertical redevelopment. Our consultant team, comprised of Raftelis and three subcontractors (NUE Urban Concepts, ESRP Corporation and Murphy Planning), will provide impact fees for up to six types of infrastructure and provide the City integrated work products addressing mobility/transportation, land use, and funding solutions.

As summarized in this paragraph, impact fees are one-time payments for specific public infrastructure that benefits new development. In contrast to project-level improvements, impact fees fund growth-related infrastructure that will benefit multiple development projects, or the entire jurisdiction (referred to as system improvements). Impact fees must proportionately allocate infrastructure costs to all types of new development. The consultant team will help the City impose impact fees to cover the growth-share of infrastructure costs, thus reducing the funding burden on existing taxpayers.

Raftelis recommends an initial feasibility analysis, to reach consensus on infrastructure types that are suitable for impact fees. After the feasibility analysis, we will calculate impact fees for the feasible facilities. The following scope of services focuses on feasibility at the beginning of the study followed by the impact fee study and related adoption process. Our project approach is consistent with impact fee case law and Section 163.31801, Florida Statutes, which

is the Florida Impact Fee Act. This enabling legislation requires impact fees to be “based on the most recent and localized data” and sets an extraordinary standard for legal challenges by stating, “the government has the burden of proving by a preponderance of the evidence that the imposition or amount of the fee meets the requirements of state legal precedent or this section.” In Florida, the legal precedent is generally known as the dual rational nexus test (i.e., need for growth-related improvements and benefit to new development), plus the overarching precedent of “rough proportionality”, as set forth by federal courts.

Our consultant team has assisted local governments throughout Florida with impact fees, mobility fees, land use policies/regulations, administrative manuals, and funding strategies. We have the experience necessary to develop legally defensible fees that meet the dual rational nexus and rough proportionality tests. We will work with stakeholders and the City of Hollywood to understand the pros and cons of a mobility fee and the possibility a fee for affordable housing. Given the complexity of mobility and affordable housing issues, Raftelis has reached out to leading experts with extensive experience in Florida. Murphy Planning will draw upon resources from the University of Florida’s Shimberg Center for Housing Studies to assist the City with affordable housing solutions. Nue Urban Concepts (NUC) and ESRP Corporation will collaborate on mobility/transportation solutions.



TASK 1**Project Initiation, Data Collection and On-going Management**

The consultant team proposes a kick-off meeting with City administration and staff representing each possible impact fee. The kick-off meeting provides a forum for introductions, clarifying expectations, answering questions about tasks/timeframe and enabling discussion of impact fee policies (high-level issues affecting all Departments). After the kick off meeting, we will conduct staff interviews to gain an in-depth understanding of the City's existing standards, cost factors, growth-related infrastructure needs and organizational framework. These interviews will aid in developing an understanding of levels of services for infrastructure and performance measures relevant to a mobility fee.

The consultant team places a premium on providing high-quality, accurate deliverables. A well-defined project management and quality assurance process ensures our work products meet or exceed client expectations. While assisting local governments across the country, the consultant team has developed a quality assurance process that includes involvement of the entire consultant team from project initiation, experienced managers that adapt best practices to unique characteristics of each community, and review of all work products by senior-level project managers and directors.

The consultant team will initiate its project management and quality assurance process during Project Initiation. To

facilitate continuous progress, the consultant team will have direct contact with staff and involve the Project Manager in all written correspondence and conference calls. The Project Manager is responsible for all work products, ensuring best practices for the industry are applied with wisdom. The Project Director will review all work products for consistency, accuracy, and validity. The consultant team will review work products prior to public distribution, ensuring citizen/stakeholder engagement is collaborative and effective.

Meetings: One kick-off meeting and initial staff interviews

Deliverables: Presentation materials, data request; and contact information for the entire consultant team

TASK 2**Demographics Analysis and Development Projections**

The purpose of this task is to identify future service area demands for infrastructure capacity and to identify capital improvements needed due to development. It includes an evaluation of current service area demographics, as well as a projection of residential and nonresidential development within service areas. This task includes a review of population projections and other service area demographics contained in such documents as the Comprehensive Plan, Metropolitan Planning Organizations long range transportation plan, and other available data sources such the U.S. Census Bureau's American Community



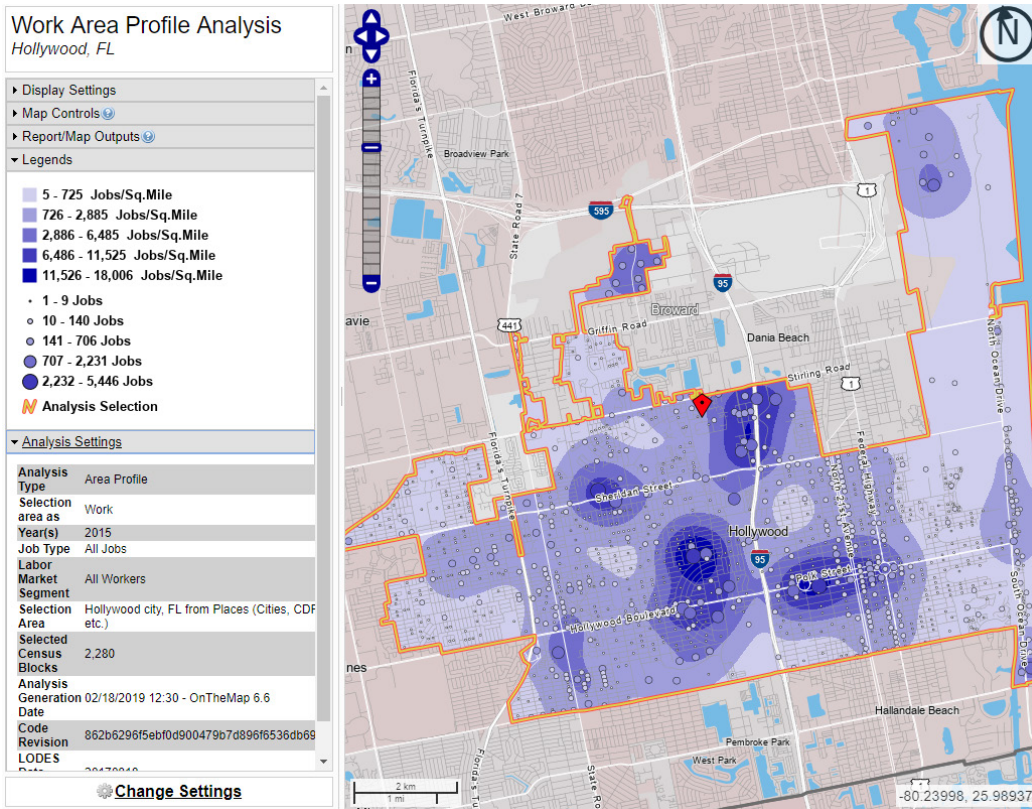
Survey and OnTheMap web application for place of work employment. We will work with staff and stakeholders to agree on appropriate growth projections.

For residential development, Raftelis can recommend alternatives that help address affordability concerns and make impact fees less “regressive”. For more information on this topic, please see the Planning Advisory Service Memo, “Next-Generation Transportation Impact Fees”, primarily written by Dr. Guthrie for the American Planning Association

in 2015.

Raftelis can work with staff and stakeholders to evaluate whether to consider lower mobility or transportation fees in a walkable urban area, or along urban corridors where the City wants to encourage infill or redevelopment. This approach would enable improvements in select areas to focus on complete streets and multiple modes of travel (i.e. moving people instead of moving vehicles). In a 2016 impact fee study for Coral Gables, Florida, Dr. Guthrie helped the City implement a

Concentration of Jobs in Hollywood, FL



mobility fee that allocated the growth cost of improvements based on functional population (i.e. resident population plus jobs within the service area, with adjustments for community patterns).

There are numerous factors to consider when designating walkable urban areas and urban corridors, such as current population and job density. For example, the map below indicates the location of jobs and jobs per square mile within Hollywood (source is U.S. Census Bureau’s OnTheMap web application). As a general principle, balancing a community’s jobs-housing ratio will minimize vehicular travel, promote economic development and improve fiscal health.

Meetings: One webinar to discuss a draft of the

demographic analysis and development projections with the Management Team

Deliverables: Draft and final demographics and development projections

TASK 3

Evaluate Current Conditions, Survey Fees and Review Plans

Our consultant team likes to start off with a thorough review of the future lane use element and map, existing zoning regulations and an understanding of existing development patterns. Our team also discusses with elected officials, staff and economic development coordinators assessment areas and development categories based on either physical location or

type of development. Most of the mobility fees developed by NUE Urban Concepts have featured multiple assessment areas and to the greatest extent feasible, limited the number of benefit districts to ensure that adequate funds could be collected to fund improvements identified in the mobility plans, while still meeting the “benefits” portion of the dual rational nexus test.

Technology and innovation are occurring rapidly and provide an opportunity to proactively plan for the provision of mobility through multiple platforms. Local governments are shifting away from moving vehicles towards the movement of people through walking, bicycling, transit, shorter vehicle trips, and shared mobility programs. In addition, the types of facilities needed to

accommodate multiple modes of travel are also evolving. Below are some of the types of facilities that local governments are starting to integrate into mobility plans and fees.

The consultant team will undertake a comprehensive review of existing plans, programs, projects and the availability of revenue sources. Our team will also review existing traffic characteristic data such as number of lanes, traffic congestion, classification of facilities, sidewalks, bike lanes and trails and any level or quality of service analysis that have been prepared for the City, MPO and FDOT. The evaluation will help identify existing facilities and capital improvements suitable for impact fee funding.

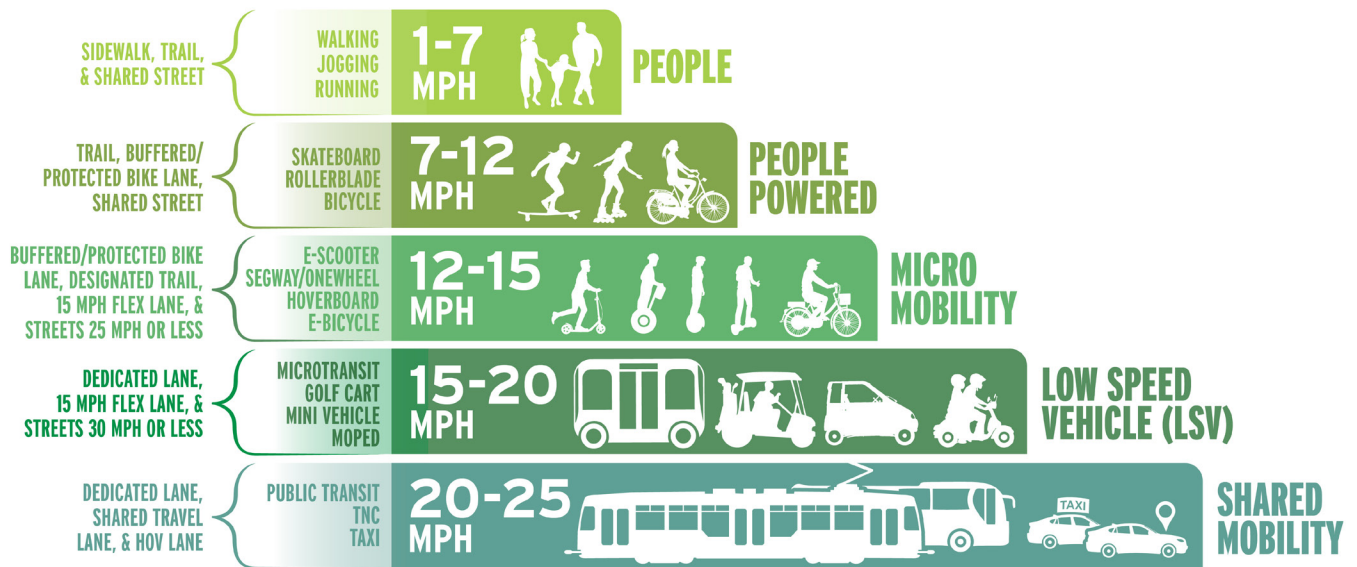
Meetings: Webinar to discuss with staff:

- 1) assessment of current conditions and regulations;
- 2) summary of existing impact fees in comparable communities;
- 3) preliminary recommendations on feasible impact fees; and
- 4) policy options for affordable housing.

TASK 4

Initial Consensus Building with Stakeholders and City Commission

On-going project management includes specific steps to facilitate consensus building. This process has both an internal and external dimension. The consultant team would like for the City to formalize a “Management Team” to work with us during the impact fee study. We would like to include representatives from the City



Manager’s Office, Attorney’s Office, Finance, Public Works, Economic Development and Planning/Development Services. The consultant team will go over all deliverables with the Management Team, then with the City Manager and elected officials. We will schedule enough time to allow participants to review materials prior to meetings. After internal reviews with staff, we will schedule time to make modifications to draft deliverables prior to releasing work products to elected officials and citizens.

While more local governments across Florida are pursuing alternatives to transportation concurrency, such as mobility fees, the concept is still new. The consultant team employs a significant number of graphics to illustrate potential improvements. Members of the public are looking beyond lines on a map. They want to see before and after cross-sections and before and after visual illustrations of what improvements will look like. They also want

to be engaged in the process and feel like their voices are being heard. Our consultant team also has the experience to develop prototype mobility fee schedules and to use a wealth of examples from other communities to illustrate different assessment areas, development patterns, and benefit districts to solicit active feedback from the community. The consultant team also does not blindly follow the Institute of Transportation Engineers (ITE) Trip Generation Manual. The mobility fee land use schedule will reflect the desired type of development pattern and preferred land uses for the City. Below is one example of before and after graphics that NUE Urban Concepts prepares to help engage the public and facilitate discussions.

The consultant team also works with local governments to prepare one or two-page overviews about mobility plans and mobility fees to inform and engage the public, community stakeholder, development interest and elected

officials. These overviews tend to evolve as mobility plans and mobility fees are developed. They initially provide a general overview about mobility plans and mobility fees. As the process moves forward, they integrate more specific elements regarding the mobility plan and mobility fee. At the end of the process, they provide an overview of what has occurred and what are the next steps. In many ways, these overviews function as pre-emptive frequently asked questions (FAQs). Some local governments like to provide flyers or pamphlets of FAQs, often posted on the governments webpage or provided in the building department. The dissemination of information during the process of developing a mobility plan and mobility fee helps address frequent questions and is also a sign that the process is transparent and not some secret effort to allow more development or take away cars or rake developers over the coals. It is very easy to lose community support if interested parties

feel they are not engaged or part of the process.

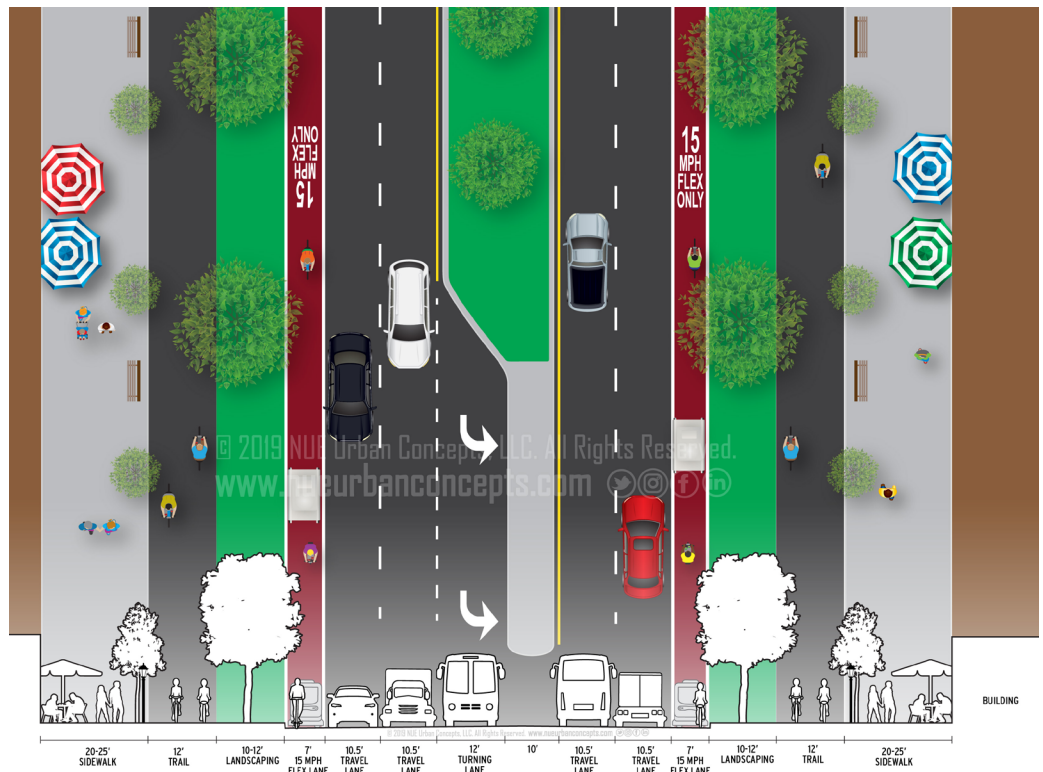
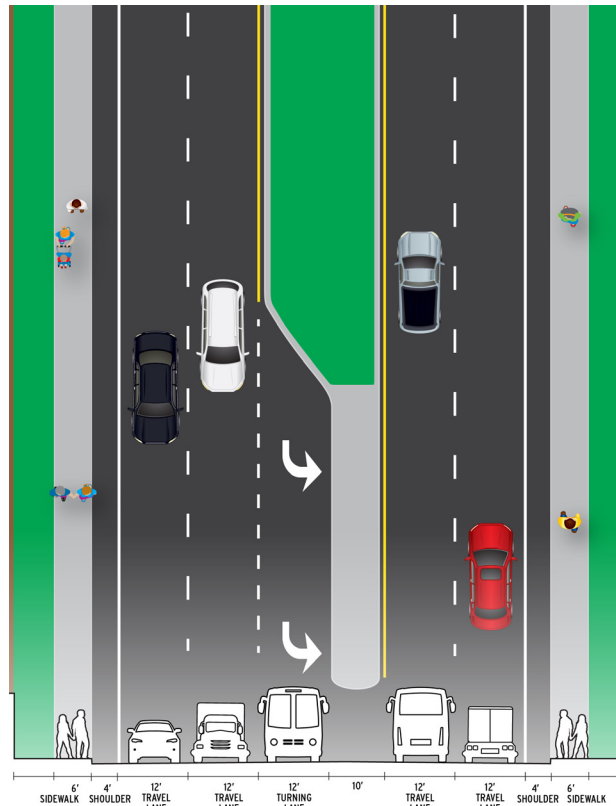
Meetings: Two webinars with staff and one City Commission workshop
Deliverables: Agendas, presentation materials and handouts; meeting minutes.

TASK 5
Infrastructure Standards, Performance Measures, and Growth Cost of Capital Improvements

One of the biggest differences between an impact fee and a mobility fee is the recognition of the capacity of multimodal facilities such as sidewalks, paths, trails, bike lanes, shared streets, dedicated transit lanes, intersection improvements and roadway improvements. Multimodal facilities tend to be cheaper than roadway facilities and can move people

at a lower cost. With pre-planning, the mobility fee can be developed to actively reflect the cost of improvements identified in the mobility plan while at the same time being at a level that garners support from stakeholders. Our team can pull from its prior experience to develop a mobility fee that works best for the community. The following is an example of the difference in capacity between a typical, vehicle-oriented street and a multimodal street.

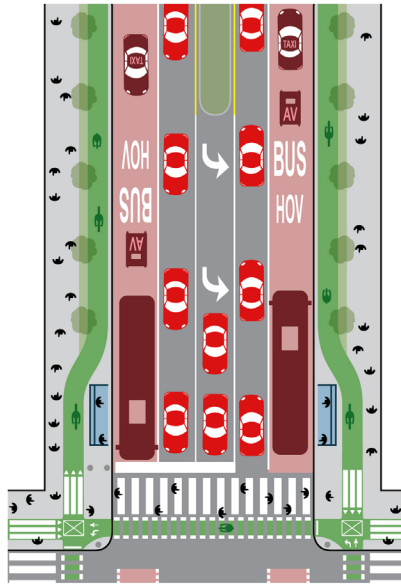
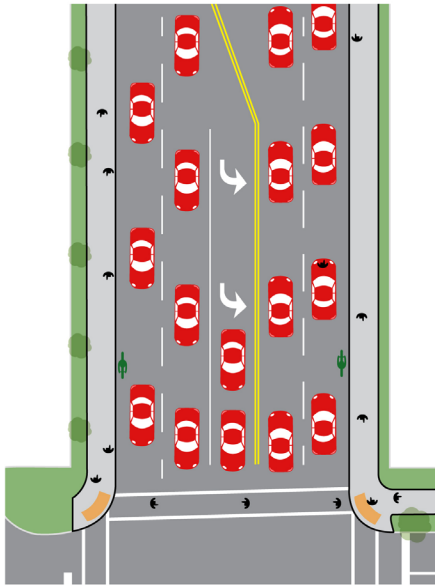
The consultant team will update level of service standards and summarize the growth cost of infrastructure needed to accommodate development. The feasibility of traditional impact fees and mobility fees depends on planned capital expenditures over the next five to ten years, the growth share that can be allocated to new development, and the availability of other revenues to cover the cost of improvements attributable to existing development. To withstand a potential legal challenge, the City should have a financially feasible plan to spend fee revenue on capital improvements that provide a substantial benefit to new development. The consultant team will work with staff and stakeholders to evaluate a range of alternatives, eventually matching the community's desire for improvements with its willingness to pay. The consultant team will also help the City evaluate possible changes in cost allocation methodologies and implementation policies to make fees compatible with land use objectives and revenue strategies.



Meetings: One webinar to discuss initial analysis with staff
Deliverables: Presentation



Car-Oriented Street




Multimodal Street



Hourly Capacity of a Car-Oriented Street

Hourly Capacity of a Multimodal Street

	120/h	x2	240 people/h
	1,600/h	x4	6,400 people/h

	1,200/h	x2	2,400 people/h
	1,800/h	x2	3,600 people/h
	2,300/h	x2	4,600 people/h
	1,600/h	x2	3,200 people/h

 Total Capacity: 6,640 people/h

 Total Capacity: 13,800 people/h

materials and meeting minutes.

TASK 6
Alternative Fees and Funding Strategy

There are multiple ways to setup a mobility fee system that will meet the specific needs of the City of Hollywood. Each mobility fee developed by the consultant team is unique and tailored to meet the needs and vision for the community. The Florida Legislature has pro-

vided local governments with flexibility to determine what works best for their community, so long as the mobility fee meets the dual rational nexus test. The courts have also held that any fee assessed on development must be roughly proportional to the impact of that development.

There are multiple ways to determine the basis for a fee. At the City level, person miles of travel are increasingly becoming the preferred metric for evaluating impact. The 2017 National Household Travel Survey data has recently been released and

provides a wealth of information on trip purpose, trip length, vehicle occupancy and person trips. Local governments are also starting to mine big data and cell phone data to get real-time trip length and origin/destination data. Given unique development patterns Hollywood, it may be beneficial to look at alternative sources of data for trip lengths and trip purposes, such as cell phone data.

During this task, the consultant team will calculate impact fees for each fee category, based on a model developed and tailored to the City's impact fee

service areas. Impact fees will be calculated by type of infrastructure, with capital costs allocated by type of development. In addition to draft impact fees, the consultant team will compare projected impact fee revenue to the growth cost of capital improvements to identify funding gaps that may require other revenue sources. Hollywood's mobility plan may identify the need for revenues to enhance current infrastructure standards or expand transit operations. Our consultant team is currently working on several innovative transportation funding solutions, such as a Vehicle Registration Efficiency Fee recently proposed in Boulder Colorado. To generate funding for multimodal transportation improvements, the City of Hollywood could also apply the idea of "value capture" to recover some of the value that public infrastructure generates for private landowners. Public investments, such as building transportation facilities, can increase adjacent land values, generating additional profits for private landowners. To help create value, the could consider increasing both residential density and non-residential intensity within walkable urban areas, while repealing parking minimums. The extra value could then be "captured" by converting it into public revenue, using available mechanisms such as special assessments or the establishment of a Municipal Service Benefit Unit.

Meetings: One webinar to discuss initial fees and funding strategy with staff
Deliverables: Presentation of impact fee model

TASK 7

Internal and Public Review of Draft Reports

The consultant team has developed numerous impact and mobility fees for local governments throughout Florida. Some local governments have elected to prioritize improvements on an annual basis as part of the Capital Improvements Plan process and annual budget development. Other governments have developed tiered improvements in five and ten-year increments, depending upon the horizon year of the mobility plan. Increasingly, mobility plans also include strategies to address parking, curb management and vision zero plans. Draft reports will include a table of improvements, with cost estimates, as well as maps of capital improvements. Mobility plans may include more multimodal improvements than those needed just to accommodate new growth. Mobility fees can only charge new development for its share of improvements. The mobility plan and mobility fee can be structured in a way to ensure that new developments are not assessed more than their proportionate share and that portions of multimodal improvements can also be funded by revenue sources beyond mobility fees. The mobility fee can either be integrated into a mobility plan or in a separate technical report. The plan and/or technical report will document the methodology used to calculate the fee and reference the sources of data used to develop the fee. The land uses and assessment areas in a mobility fee can have a significant impact on fees to be assessed on development and the day-

to-day administration of a fee.

The consultant team will produce a draft development fee report for staff review. It will include detailed calculations and methodology for each impact fee, with a proposed fee schedule. The Draft Report will include: 1) an executive summary of updated fee calculations by category, 2) projected growth in residential and non-residential service units, 3) proposed fee schedule for residential and non-residential developments by impact fee facility category and service area, 4) description of methodologies, level of service standards, costs factors, supporting data and rationale underlying the recommended fees, 5) projected cash flow by fee category over a 5- to 10-year period, 6) comparison of prior and proposed impact fees, 7) strategies and options for impact fee phase-in and/or reductions, 8) recommended implementation policies.



Meetings: After receiving consolidated comments on the draft report from staff, we will discuss changes during a webinar, then issue a revised report. The consultant team will present the public-review draft report during an on-site meeting with elected officials.
Deliverables: One Word copy, and one PDF copy of the internal draft and public-review reports.

TASK 8

Fee Adoption Process and Implementation Mechanisms


















The development of impact and mobility fees is also an opportunity to explore updates to land use policies and regulations to enable mixed-use development, traditional neighborhood developments

and what is frequently referred to as missing middle housing. Missing middle housing is the reconsideration of predominately single-family zoning to allow for broader densities to incorporate twin homes (villas), duplexes, townhomes, row houses, triple decker homes, bungalow courts, small scale multi-family and cottage homes. In addition to allowing greater housing diversity, local governments are also implementing parking management strategies such as decoupling parking from development and eliminating minimums, implementing curbside management and developing mobility hubs to bring together new mobility technologies and multimodal facilities.

Mobility hubs are organizing elements that can: (1) be requirements for new developments that provide reduced parking, (2) co-locate with shared use parking lots or garages located in commer-

VISION ZERO SPEED LIMITS

CITIES, NEIGHBORHOODS, MIXED-USE DEVELOPMENTS, MOBILITY DISTRICTS

Europe (kph)	U.S. (mph)	Applicable Locations	Europe (kph)	U.S. (mph)	Applicable Locations
		Main Streets City Centres Square/Plaza/Promenade(s)			Residential Streets Main Streets
		Woonerf (pl. woonerven) Living/Shared Streets Alleyways Residential Streets			Residential Streets Main Streets Minor Collectors
					Major Collectors Minor Arterials
					Principal Arterials

cial and redevelopment areas where parking minimums are removed or reduced to create park once environments and incentivize infill development and redevelopment, and (3) serve as trail heads as part of a larger overall network of citywide trails. Many local governments see trails as an economic development feature as well as a viable facility for multimodal travel.

Local governments are also focusing on safety and many are exploring the development of Vision Zero Plans with an aspirational goal of zero fatalities on the transportation system. A mobility plan is an opportunity to integrate multimodal facilities and safety design features into the transportation system. A mobility plan is also an opportunity to reimagine the function of roads from primarily moving cars to moving people and repurposing (aka road diets) road right-of-way to add pro-

tected bike lanes, or wider sidewalks or dedicated lanes for transit or flexible lanes for golf carts, micro transit (autonomous transit), e-scooters and e-bikes. Changing physical geometry of roads is the major component of a Vision Zero Plan. The other major component is addressing posted speed limits. NUE Urban Concepts is working with several communities to consider the following Vision Zero appropriate speed limits:

After a work session with elected officials, we will debrief with City staff via webinar to discuss any significant comments or issues raised by participants. We will then update the fees and report, if needed, then provide the City electronic copies in Microsoft Word and PDF files. We will then present the impact fee report at public hearing before the Planning and Zoning Board, then the City Commission. Should elected officials

request any final revisions, we will work with staff to revise the report.

Meetings: One webinar and two Public Hearings
Deliverables: One Word copy, and one PDF copy of the Final Report

ADDITIONAL SERVICES

There are additional tasks that the City may request in addition to the scope of services enumerated above. Additional tasks may include, but are not limited to, an Administrative Procedures Manual and a more extensive stakeholder outreach program. Impact fees always create questions and concerns with various stakeholders. Public outreach is an important component of the impact fee implementation process. Examples of public outreach

efforts include the planning and facilitation of stakeholder meetings with developer associations, the local chamber of commerce, and other organizations. If City staff does not conduct an outreach effort, Raffelis has staff experts available to assist with these efforts should the City desire this additional service.

Schedule

The consultant team will begin work in April 2019 and take approximately five months to complete Hollywood’s impact fee study. Task 1 (project management) and Task 4 (consensus building) will extend over the entire timeframe. During the first two months, the consultant team will complete Tasks 2 and 3, then hold a work session with elected officials to present impact fee feasibility recommendations and possible alternatives for affordable housing. The on-site meetings shown in Task 4 are tentative and can be adjusted. Details and dates will be collaboratively agreed upon during April.

Impact Fees for Hollywood, FL	April	May	June	July	August
1. Project Initiation, Data Collection and On-Going Management					
2. Demographics Analysis and Development Projections					
3. Evaluate Current Conditions, Survey Fees and Review Plans					
4. Consensus Building with Stakeholders and City Commission					
5. Infrastructure Standards, Performance Measures and Growth Cost of Improvements					
6. Alternative Fees and Funding Strategy					
7. Internal and Public Review of Draft Reports					
8. Fee Adoption Process and Implementation Mechanisms					

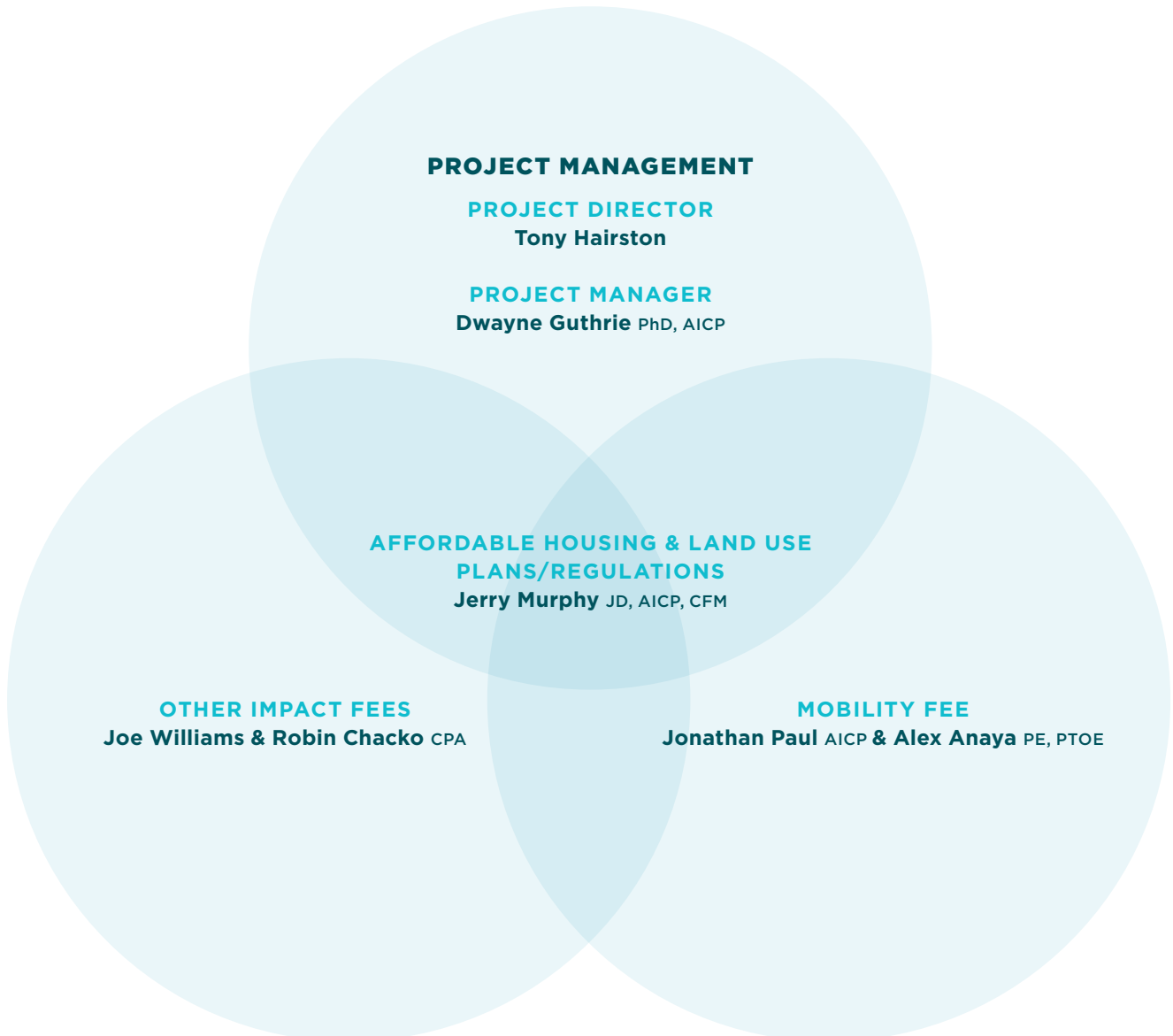
- Deliverables
- Web Meetings
- In-Person Meetings / Workshops

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Project Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S PROJECT.

Our team includes senior-level professionals to provide experienced project leadership, with support from talented consultant staff. This close-knit group has frequently collaborated on similar successful projects, providing the City with confidence in our capabilities. Here, we have included a venn diagram showing the structure of our Project Team. In Appendix 1, we have provided detailed resumes.



WHO IS

Raftelis

**RAFTELIS IS THE
TRUSTED ADVISOR TO UTILITIES
AND THE PUBLIC SECTOR.**

+ Visit www.raftelis.com to learn more



Raftelis provides utilities and public-sector organizations with insights and expertise to help them operate as high-performing, sustainable entities providing essential services to their citizens. We help our clients solve their finance, organizational, and technology challenges, achieve their objectives, and, ultimately, make their communities better places to live, work, and play.

THE CITY
& RAFTELIS

The Right Fit

We believe that Raftelis is the right fit for this project. We provide several key factors that will benefit the City and help to make this project a success.



RESOURCES & EXPERTISE

This project will require the resources necessary to effectively staff the project, and the skillsets to complete all of the required components.

With more than 80 consultants, Raftelis has one of the largest municipal financial and rate consulting practices in the nation. Our depth of resources will allow us to provide the City with the technical expertise necessary to meet your objectives. In addition to having many leading financial consultants, we also have experts in key related areas, like stakeholder engagement and data analytics, to provide additional insights as needed.



DEFENSIBLE RECOMMENDATIONS

When your elected officials and customers are considering the validity and merit of recommended changes, they want to be confident that they were developed by experts using the latest industry standard methodology.

Our senior staff are involved in shaping industry standards by chairing various committees within professional organizations. Raftelis' staff members have also co-authored many industry standard books regarding utility finance and rate setting. Being so actively involved in the industry will allow us to keep the City informed of emerging trends and issues, and to be confident that our recommendations are insightful and founded on sound industry principles. In addition, with Raftelis' registration as a Municipal Advisor, you can be confident that we are fully qualified and capable of providing financial advice related to all aspects of utility financial planning in compliance with federal regulations.



HISTORY OF SIMILAR SUCCESSES

An extensive track record of past similar work will help to avoid potential pitfalls on this project and provide the know-how to bring it across the finish line.

Raftelis staff have assisted 1,000+ public-sector organizations throughout the U.S. with financial and rate consulting services, with wide-ranging needs and objectives. Our extensive experience will allow us to provide innovative and insightful recommendations to the City, and will provide validation for our proposed methodology ensuring that industry best practices are incorporated.



USER-FRIENDLY MODELING

A modeling tool that your staff can use for scenario analysis and financial planning now and into the future will be key for the City going forward.

Raftelis has developed some of the most sophisticated yet user-friendly financial/rate models available in the industry. Our models are tools that allow us to examine different policy options and cost allocations and their financial/customer impacts in real time. Our models are non-proprietary and are developed with the expectation that they will be used by the client as a financial planning tool long after the project is complete.



IMPACT FEES THAT ARE ADOPTED

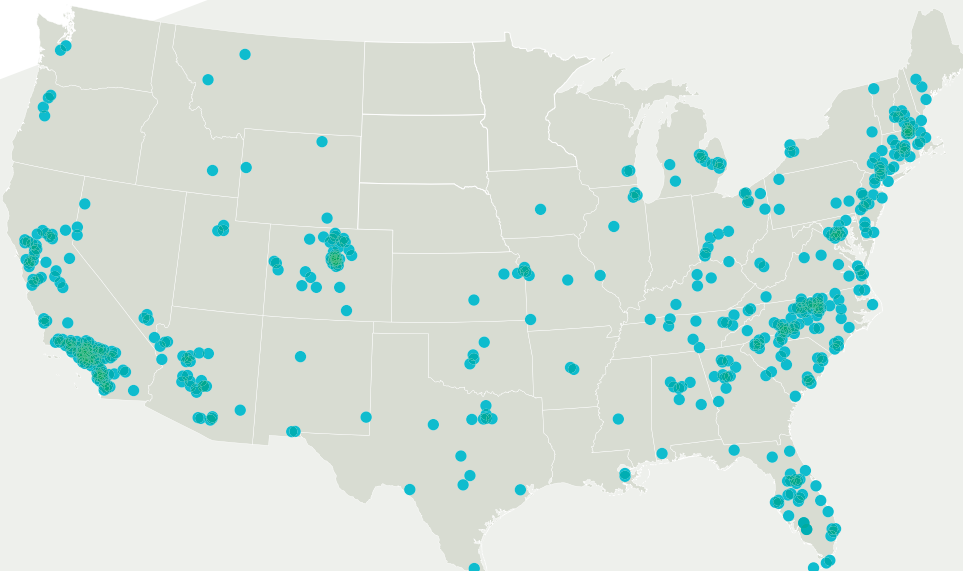
For the study to be a success, fees must be successfully approved and implemented.

Even the most comprehensive study is of little use if the recommendations are not approved and implemented. Raftelis has assisted numerous agencies with getting proposed fees and rates successfully adopted. We develop a message regarding the changes that is politically acceptable, and convey that message in an easy-to-understand manner. We focus on effectively communicating with elected officials about the financial consequences and rationale behind recommendations to ensure stakeholder buy-in and successful rate adoption.

Experience

RAFTELIS HAS ONE OF THE MOST EXPERIENCED PUBLIC-SECTOR FINANCIAL AND MANAGEMENT CONSULTING PRACTICES IN THE NATION.

Our staff have assisted more than 1,000 public-sector organizations across the U.S., including some of the largest and most complex cities in the nation. In the past year alone, Raftelis worked on more than 600 financial/organizational/technology consulting projects for over 400 public agencies in 40 states, the District of Columbia, and Canada.



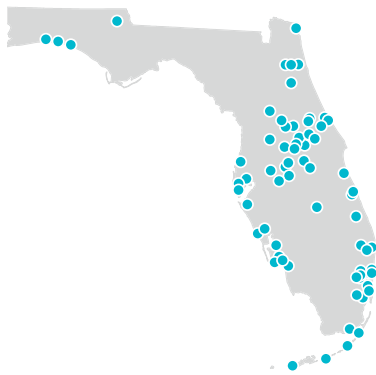
Raftelis has provided financial/organizational/technology assistance to utilities serving more than

25%

of the U.S. population.

This map shows some of the utility clients that we have assisted.

FLORIDA EXPERIENCE
Raftelis' staff have extensive experience serving Florida public sector agencies. The map below and the matrix to the right show some of the Florida public sector entities/utilities that Raftelis staff have served.



	Rate Studies & Pricing					Enterprise Consolidation Wholesale Rates	Financial Planning	Impact Fees	Management Consulting	Valuation	Litigation Support	Management Accounting	Contracts / Ordinances	Debt Issuance Assistance
	Water	Wastewater	Stormwater	Irrigation Water	Raw Water									
City of Alachua					●									
City of Auburndale	●	●					●						●	●
Bonita Springs Utilities	●	●		●			●	●						
City of Cape Canaveral		●					●						●	
Charlotte County	●	●				●								
City of DeLand	●	●		●	●		●	●					●	
Destin Water Users	●	●		●		●	●	●	●				●	
City of Eustis	●	●	●	●	●		●	●	●				●	
Florida Keys Aqueduct Authority	●	●		●	●	●	●	●	●					●
Town of Fort Myers Beach	●						●						●	
City of Fort Walton Beach	●	●		●		●	●	●					●	●
City of Groveland	●	●		●	●		●	●					●	
Indian River County	●	●		●	●	●		●					●	
Village of Islamorada		●			●	●	●		●				●	●
Town of Lauderdale-by-the-Sea	●	●	●	●		●	●						●	
City of Lake Alfred	●	●	●	●			●						●	
City of Largo		●	●		●	●	●	●					●	
City of Lake Wales	●	●		●			●							
City of Marathon		●	●		●		●							●
City of Margate	●	●	●				●	●					●	
City of Mascotte		●				●	●	●					●	
Town of Oakland	●	●				●	●	●	●				●	●
City of Ocala	●	●		●		●	●	●	●		●		●	
City of Oldsmar	●	●	●	●	●	●	●	●						
City of Orlando		●					●							
City of Oviedo	●	●		●	●		●	●	●	●			●	●
Town of Palm Beach						●	●			●				
Pinellas County	●	●		●	●	●	●		●					
City of Plant City	●	●	●	●	●		●	●						●
City of Pompano Beach	●	●			●	●	●	●	●				●	
City of Port St. Lucie	●	●	●	●		●	●	●	●	●	●		●	●
St. Johns County	●	●		●	●	●	●	●		●			●	●
City of Sanford	●	●	●	●	●		●	●	●				●	●
South Walton Utility Co., Inc.	●	●		●			●	●	●					
Tohopekaliga Water Authority	●	●		●	●	●	●	●			●			●
City of Tavares	●	●		●	●		●	●					●	●
Volusia County	●	●		●	●	●	●	●	●	●			●	
City of Wilton Manors	●	●	●				●	●						
City of Winter Haven	●	●	●	●	●	●	●	●	●	●			●	●
City of Zephyrhills	●	●					●	●					●	●

Client	Finance					Organization					Technology					
	Affordability Analysis & Program Development	Capital Improvements Planning/Prioritization	Debt Issuance Support	Economic & Financial Evaluations	Financial Planning & Modeling	Rate, Charge, & Fee Studies	Stormwater Utility Development & Support	Organizational, Governance, & Operations Optimization	Performance Measurement & Benchmarking	Program Planning & Support	Stakeholder Engagement & Communication	Strategic Planning	Billing, permitting, & Customer Information Audits	Business Process Development	Data Management, Analytics, & Visualization	Software Solutions
MI Saginaw, City of		●			●	●										
MO Metropolitan St. Louis Sewer District		●	●		●	●	●	●								
MS Jackson, City of	●	●			●	●		●							●	
NC Asheville, City of		●	●		●	●		●			●					
NC Charlotte Water	●	●			●	●										
NC Durham, City of		●	●		●	●										
NC Fayetteville, City of		●	●		●	●	●									
NC Raleigh, City of		●	●		●	●	●	●		●						
NH Concord, City of		●			●	●										
NJ Brick Township Municipal Utilities Authority					●	●										
NJ Jersey City Municipal Utilities Authority		●			●	●										
NV Henderson, City of		●			●	●										
NY Erie County Water Authority					●	●										
NY New York City Water Board		●			●	●									●	
OH Akron, City of		●			●	●					●					
OH Franklin County		●			●	●		●								
OH Montgomery County Environmental Services		●			●	●		●	●		●		●	●	●	
OH Northeast Ohio Regional Sewer District	●	●			●	●	●	●							●	●
OK Chickasha, City of					●	●	●	●		●			●	●	●	
OK Stillwater Utilities Authority					●	●									●	
OR Portland Bureau of Water, City of		●	●		●	●									●	
PA Capital Region Water	●	●	●		●	●	●			●	●					
PA Philadelphia Water Department	●	●	●		●	●		●	●	●	●		●	●	●	
PA Pittsburgh Water and Sewer Authority	●	●		●	●	●		●	●	●	●		●	●	●	
RI Newport, City of		●	●		●	●										
RI Providence Water Supply Board		●			●	●		●	●							
SC Greenville Water					●	●		●								
SC Mount Pleasant Waterworks		●			●	●					●					
TN Johnson City, City of	●	●	●		●	●										
TN Metro Water Services of Nashville and Davidson County		●	●		●	●	●		●	●	●					
TX Austin, City of		●	●		●	●			●							
TX Dallas, City of		●			●	●	●			●			●	●		
TX El Paso Water Utilities		●	●		●	●				●				●	●	
TX North Texas Municipal Water District		●		●				●	●	●	●		●	●	●	
TX Round Rock, City of						●										
TX San Antonio Water System	●	●			●	●				●						
UT Salt Lake City					●	●				●						
VA Newport News Department of Public Utilities, City of		●	●		●	●					●				●	
VA Richmond Department of Public Utilities	●	●			●	●	●			●					●	
VA Suffolk, City of		●	●		●	●										
VT Burlington, City of		●	●		●	●										
WA Tacoma, City of				●		●					●				●	
WI Milwaukee Metropolitan Sewerage District		●			●	●										
WI Milwaukee Water Works		●			●	●										
WV Charleston Sanitary Board						●										
Can Calgary, City of		●			●			●							●	
PR Puerto Rico Aqueduct and Sewer Authority		●	●		●			●	●	●						

On the following pages, we have provided detailed descriptions of several projects that we have worked on that are similar in scope to the City's project. We have included references for each of these clients and urge you to contact them to better understand our capabilities and the quality of service that we provide.

Raftelis

City of Winter Springs

FLORIDA

Reference: Kevin Smith, City Manager, 1126 East State Road 434, Winter Springs, FL 32708 - P: 407.327.5957 / E: ksmith@winterspringsfl.org

Size: 35,600

Services provided: Police, Fire, Parks/Recreation and Transportation Impact Fees

Cost of project: \$63,100 (sum of transportation fee, police, and recreation fee studies)

Role: Primary

Date of completion: 2018

The City of Winter Springs (City) is a growing suburb located in the Orlando area. Raftelis has provided impact fee services for the City of Winter Springs since 2014. Raftelis first reviewed the City's existing police and fire impact credit schedule and provided recommendations on modification to the existing policy. This engagement was followed by a fire impact fee study completed in 2015 to incorporate current growth projections and capital costs for fire services. In 2016 Raftelis conducted a transportation impact fee study to update the existing impact fees and land uses to match development trends and the costs of improvements allocated to new growth. The proposed transportation fees were adopted by the City in 2016. In 2017, Raftelis updated the City's parks/recreation and police impact fees. The City Council adopted the proposed impact fees in late 2017.

City of Lake Alfred

FLORIDA

Reference: Ryan Leavengood, City Manager, 155 E. Pomelo Street, Lake Alfred, FL 33850 - P: 863.291.5747 / E: RLeavengood@mylakealfred.com
Size: 5,900
Services provided: Police, Fire, Parks/Recreation, Public Facilities, Water and Wastewater Impact fees
Cost of project: \$47,020
Role: Primary
Date of completion: 2018

Raftelis was retained by the City of Lake Alfred (City) in 2016 to conduct a water and sewer rate study including rate design and financial forecasting activities. The result of this study led to rates that were effective in meeting the City's needs and were adopted by the Commission.

In 2018 the City retained Raftelis to update their municipal and utility impact fees. The City is on the outskirts of Orlando, in close proximity to the high employment areas of Disney World and Universal Studios. As the areas around the City become increasingly populated, there has been large interest in new development in the City. In order to ensure that the current high quality of services are maintained as the City is set to more than double in size, an impact fee update was warranted. With the completion of a recent parks and recreation master plan, projects were identified as expansion versus replacement and then the expansion projects were allocated proportionately to existing development and new growth. Lake Alfred is a member of the Polk Regional Water Cooperative, consisting of many communities in Polk County, with the purposes of jointly developing and funding alternative water supplies. While this venture is still in the early stages of identifying the appropriate sources and means of obtaining alternative water there have been costs passed down to the members. These costs are related to expansion of water supplies and thus have been factored into the water impact fee recovery.

City of Goodyear

ARIZONA

Reference: Tamara Blonar, Budget and Research Analyst, 190 North Litchfield Rd., Goodyear, AZ 85338 - P: 623 882 7847 / E: tamara.blonar@goodyearaz.gov
Size: 77,258
Services provided: Police, Fire, Parks/Recreation, Streets, Water and Wastewater
Cost of project: \$240,000
Role: Primary
Date of completion: 2017-2018

The City of Goodyear (City) is located on the western side of the Phoenix metro area and is experiencing significant new development. Raftelis conducted an update to the LUA, IIP and development impact fees for police, fire, recreation, streets, water and wastewater services. A majority of the fees in the City are divided into two service areas, due to a unique arrangement with a large land owner south of the Gila River. The City's 2014 study was split between three service areas, two of which have been consolidated during the update to better reflect how the City provides necessary services. During the course of this study multiple alternatives were reviewed based on feedback from staff and the development community. The LUA and IIP report was adopted by City Council on October 22, 2018. Updated fees are scheduled to be effective on April 1, 2019.

Town of Gilbert

ARIZONA

Reference: Kelly Pfost, Management & Budget Director, 50 East Civic Center Drive, Gilbert, AZ 85296 - P: 480 503 6828 / E: Kelly.Pfost@GilbertAZ.gov
Size: 237,133
Services provided: Police, Fire Parks/Recreation, Traffic Signals, Transportation, General Government, Water and Wastewater
Cost of project: \$99,670
Role: Primary
Date of completion: 2018-2019

The Town of Gilbert (Town) is located on the eastern side of the Phoenix metro area and while growth is still occurring, the Town will be approaching build out in the next 20-25 years. This project includes an update to the LUA, IIP and system development fees for police, fire, recreation, traffic signals, general government, water and wastewater services. Due to arrangements for sharing wastewater facilities with another city, the Town has two service areas for the wastewater fees. In addition, Raftelis assisted the Town with development of a streets fee to recover the costs of intersection improvements and major roadway expansions necessitated by growth. A draft IIP, LUA and system development fees report has been provided to the Town in September 2018.

NUE Urban Concepts

Celebration Pointe Holdings, LLC

FLORIDA

Reference: Svein Dyrkolbotn, Principal, 2579 SW 87th Drive, Gainesville, FL 32608 - P: 352.333.9333 / E: svein@celebrationpointe.com

Services provided: Celebration Pointe Transit Oriented Development

Cost of project: \$200,000

Role: Primary

Date of completion: Ongoing

Celebration Pointe Transit Oriented Development

NUE Urban Concepts, LLC has served the last six years as the lead transportation and land use planner for the Celebration Pointe Transit Oriented Development in Gainesville, FL. Celebration Pointe is designed as a compact, walkable, bicycle friendly, mixed-use development designed around a central located transit station. NUC has led the effort to secure entitlements, process Preliminary Development Plan Amendments (like PD zoning), update architectural block master plans to meet form-based requirements, secure comprehensive plan amendment approvals and amend the County's Land Development Code. NUC is responsible for conducting annual detailed traffic impact analysis to monitor concurrency compliance and developer agreement requirements. This entails conducting annual traffic and turning movement counts at all project approaches and on adjacent major roads. The analysis includes travel demand modeling, trip generation and use of the latest version of Syncro.

NUC has taken the lead in designed all streets within the development as Complete Streets and incorporated a dedicated transit lane within the median of the main access corridor (SW 45th Street) and along Celebration Pointe Avenue, the new multimodal bridge over Interstate 75. Project roadways include sidewalks and trails along both sides of all roads with shade trees and buildings located to create a walkable, urban scale environment. The main street has been designed as a pedestrian and bicycle only corridor to emphasize walking, bicycling and a park once environment. Raised intersections have been incorporated at key locations to prioritize people walking.

A multimodal center has been incorporated that features a parking garage, transit transfer station, bike and car share programs, electric vehicle charging stations and ride-hailing drop-off areas. Innovative shared parking strategies and decoupling of parking from development have being incorporated within the development and talks are ongoing to have autonomous transit vehicles run on dedicated transit lanes. NUC is also taking the lead on

design of the Archer Braid Trail. NUC also worked with the Developer to secure two (2) Florida State Infrastructure Bank Loans, one to construct a new multi-modal bridge over Interstate 75, the other for internal multimodal improvements and the multimodal transportation center. The 1st SIB loan was also the 1st time the State of Florida approved a loan for a private development project. Jonathan has also led the effort securing two (2) capital bond raises for the Community Development District. NUC continues to provide ongoing transportation, land use and parking services to the development. The average yearly contract was \$200,000.

City of Altamonte Springs

FLORIDA

Reference: Tim Wilson, AICP, Mobility Director, 225 Newburyport Avenue, Altamonte Springs, FL 32701 - P: 407.571.8143 / E: TAWilson@Altamonte.org

Services provided: Mobility Fee

Cost of project: \$100,000

Role: Primary

Date of completion: 2016

Altamonte Springs Mobility Fee

NUE Urban Concepts, LLC worked over a two-year period with Staff from the City of Altamonte Springs to develop a Mobility Fee, create an implementing ordinance, establish a Mobility Solutions Report (previously traffic impact analysis), update relevant policies in City Plan 2030 (Altamonte Springs Comprehensive Plan) and update the Land Development Code. NUC worked closely with City Staff to develop the Mobility Fee based on the adopted Mobility Plan.

The Mobility Fee schedule was tailored to the land uses in Altamonte Springs and included three separate assessment areas. The lowest fee was assessed in the Transit Oriented Development Area adjacent to the SunRail Station based on both internal capture and transit ridership. A lower fee was also developed for the City's various Activity Centers to recognize the benefit of internal capture and to encourage infill development and redevelopment. The Mobility Fee was designed to support small office development and local retail development. The Fee also assessed higher fees for high traffic generating out-parcel developments.

The Mobility Fee provides the City with the flexibility to fund sidewalk, bike lanes, multi-use paths, intersections, trails, transit facilities, a transit circulator system, ride hailing subsidies, bike and care share programs, and roadway capacity projects. The City Plan Elements and Land Development Code were updated to incorporate mobility strategies and replaced transportation concurrency and proportionate-share policies within the City and

replaced the County's Road Impact Fee. The Mobility Solutions Analysis requirements were developed to replace traditional Traffic Impact Analysis and focus on multimodal access improvements such as filling in gaps in the network, providing for transit stops and bicycle racks. There was a total of four separate scopes for the various task involved in development of an implementable Mobility Fee. The total project budget was \$100,000.

City of Maitland

FLORIDA

Reference: Sara Blanchard, AICP, Chief Planner, 1776 Independence Lane, Maitland, FL. 32751 - P: 407.539.6214 / E: sblanchard@itsmaitland.com

Services provided: Mobility Plan & Mobility Fee

Cost of project: \$100,000

Role: Primary

Date of completion: 2018

Maitland Mobility Plan and Mobility Fee

NUE Urban Concepts served as the project manager and worked with the City of Maitland to update its Mobility Plan and develop a Mobility Fee. The initial step was to update the Transportation Element of the Comprehensive Development Plan to establish legislative intent. The Mobility Plan updates include the incorporation of car, bicycle and ride sharing, a downtown parking garage and complete streets and re-imagining existing transportation corridors to provide bicycle and pedestrian access to the SunRail Transit Station. The Mobility Fee, which will be used to fund pedestrian, bicycle and transit improvements, replaced transportation concurrency, proportionate share and roadway impact fees.

The Mobility Plan established Quality of Service Standards for bicycle, pedestrian, transit and roadway facilities and multi-modal capacities to demonstrate the person carrying capacity of a complete streets transportation system. Establishing multi-modal capacities focused on moving people, instead of just moving cars allows for existing roads to be re-imagined as multi-modal corridors and existing roadway travel lanes to be re-purposed for green bike lanes, cycle tracks, on-street parking and wider sidewalks. The Mobility Plan & Fee are structured to promote and encourage development within Downtown and the Community Redevelopment Area and to promote last mile connectivity improvements to the SunRail Transit Station. The Fee was also designed to encourage infill and redevelopment.

The Mobility Fee schedule was tailored to the land uses in Maitland and included three separate assessment areas based upon the Mobility Tiers adopted in the Comprehensive Development Plan. The lowest fee was assessed in the City's Community Redevelopment Area (CRA) to encourage and promote infill and redevelopment. The Mobility Fee was designed so that small, local businesses and mom and pop retail operations paid a lower fee based upon a finding of reduced impact on the transportation network.

The Mobility Fee, based on the Mobility Plan, is structured to promote development within the Community Redevelopment Area around the SunRail Transit Station just north of downtown. The Fee also includes encouraging infill and redevelopment, as well as office employment uses and neighborhood retail uses. NUC worked with City Staff during the Evaluation & Appraisal Report (EAR) process to amend the Comprehensive Development Plan (CDP) to eliminate policies related to transportation concurrency, proportionate share and road impact fees. Mobility Strategies were also updated as part of the CDP update. The total budget was \$100,000.

City of Miami Beach

FLORIDA

Reference: Rogelio Madan, AICP, Chief of Community Planning and Sustainability, 1700 Convention Center Drive, Miami Beach, FL 33139 - P: 305.673.7000 /

E: RogelioMadan@miamibeachfl.gov

Services provided: Mobility Fee

Cost of project: \$185,000

Role: Primary

Date of completion: 2018

Miami Beach Mobility Fee

NUE Urban Concepts, LLC (NUC) served as the deputy project manager working with the City of Miami Beach on development of its Mobility Fee. The Mobility Fee for the City of Miami Beach is unique as it does not include any road capacity projects and instead will be focused on walking, bicycling, transit (streetcar, bus, rail, water taxi), car and bicycle sharing and innovative parking strategies. The Mobility Fee is also the first Impact Fee or Mobility Fee based on the Mode Share Goals established in the City's Transportation Mobility Plan. The City seeks to reduce the mode share of motor vehicle trips to 43% and increase the mode share of transit trips to 20%, walking to 17%, bicycling to 8% and new mobility technologies to 12%.

The Mobility Fee also utilized both travel demand model data and National Highway Transportation Survey Data specific to Miami Beach in the determination of need and overall trip length. The Mobility Fee also takes the unique approach of establishing a travel length by mode and person trips by mode to determine the overall fee based on real world travel. The City of Miami Beach business license land use data was utilized to develop a crosswalk table to link every type of use issued a business license to the streamlined Mobility Fee scheduled to ease implementation and Fee determinations. The Mobility Fee schedule is unique to Miami Beach with fees developed for bars and night clubs, walk up restaurants, and a per seat fee established for sit down restaurants. Separate fees were also developed for the number of drive-thru lanes for restaurants and the number of drive-thru lanes and ATMs for banks. Separate mobility fees were developed based upon the number of fueling positions separate from the fees for a convenience store.

The Mobility Fee is also the first to incorporate a category for workforce / affordable housing / micro apartments. The Mobility Fee schedule is designed specifically for the unique needs and uses in Miami Beach. A list of recommendations to update the Comprehensive Plan and decouple parking and establish parking maximums was also provided. The Mobility Fee will replace the City's current per trip transportation concurrency system with a streamlined and simplified Mobility Fee schedule upon adoption of the Mobility Fee Ordinance. An evaluation of the City's parking requirements was also undertaken with recommendations provided to eliminate minimum parking requirements. Comprehensive Plan policy recommendations were also developed to implement the mobility fee. An administrative cost report is being developed. The total project budget was \$185,000.

Alachua County

FLORIDA

Reference: Jeffrey Hays, AICP, Transportation Planning Manager, 620 E. University Avenue, Gainesville, FL 32601 - P: 352.374.5249 / E: jhays@alachuacounty.us

Services provided: Mobility Plan & Mobility Fee

Cost of project: \$365,000

Role: Primary

Date of completion: 2011

Alachua County Mobility Plan and Fee

NUE Urban Concepts Principal, Jonathan B. Paul, AICP, served seven years as the Concurrency and Impact Fee Manager for Alachua County. Mr. Paul conducted two updates of the County's Transportation Impact Fee prior to developing the Alachua County Mobility Plan and Fee, the first such adopted in the State of Florida. The Mobility Plan included establishing new goals, objectives, policies and level of service standards into the Future Land Use, Transportation and Capital Improvement Elements of the Comprehensive Plan. The Mobility Plan introduced overlays for both Traditional Neighborhood Developments (TNDs) and Transit-Oriented Developments (TODs) to be designed in accordance with the Land Development Code standards and designs developed as part of the Mobility Plan. Innovative parking strategies and updates to the requirements for traffic impact analysis requirements were also incorporated into the Mobility Plan and update of the Land Development Code.

The Mobility Plan was to develop a multimodal transportation system that recognized that the community could neither afford nor desired to build its way out of congestion. With that limitation in mind, future transportation demands were evaluated, multimodal level of service (LOS) standards were developed and a network of interconnected trails, dedicated transit lanes and targeted roads was developed to connect future TODs and TNDs with retail, education and employment destinations. The Mobility Plan received awards from the Department of Community Affairs (DCA) and 1000 Friends of Florida. Mr. Paul worked with

the Center for Urban Transportation Research (CUTR) and the Florida Department of Transportation (FDOT) to produce a series of reports to the Florida Legislature where the Mobility Plan and Fee served as models. The Alachua County Mobility Fee is also the only fee, except for Broward County, within the state that includes transit-operating cost.

The Mobility Fee, based on the Mobility Plan, established multimodal quality of service capacities for pedestrian and bicycle facilities, included transit capital and operations, and was structured to have lower fees for TNDs and TODs. The Fee also included the development of areawide roadway level of service standards and a Strategic Intermodal System (SIS) Plan to address regional transportation impacts. The adopted Mobility Fee replaced transportation concurrency and proportionate share. The Mobility Plan was adopted in 2010 and the Mobility Fee in 2011. Both have been in place for over 7 years and neither have been challenged. The County Impact Fee Administrative Manual was updated to include the Mobility Fee. An Administrative Cost analysis was also performed to administer the Mobility Fee. The cost in staff time was equivalent to \$365,000.

Sarasota County

FLORIDA

Reference: Tom Polk, Impact Fee Administrator, 1660 Ringling Blvd., Sarasota, FL 34240 - P: 941.861.5140 /

E: tpolk@scgov.net

Services provided: Mobility Plan & Mobility Fee

Cost of project: \$450,000

Role: Primary

Date of completion: 2015

Sarasota County Mobility Plan and Mobility Fee

NUE Urban Concepts, LLC served as the project manager and worked with Sarasota County Staff, over a two-year period, to develop a Mobility Plan and Mobility Fee consistent with Florida Statute 163.3180 5. (i). The initial step in development of a Mobility Plan and Fee was to update the Transportation and Capital Improvement Elements of the Comprehensive Plan to establish the legislative intent. Subsequent steps involved using the Regional Travel Demand Model and existing roadway Level-of-Service (LOS) to identify needed improvements, evaluation of existing Multimodal Plans to identify needs, and review of recent construction projects to derive the most recent cost data.

The analysis was utilized to develop a Mobility Plan that consisted of two corridor types: Mobility and Multimodal. Mobility Corridors are new roads and widened roads, designed based on Complete Street principles. Multimodal Corridors are focused on filling in gaps, completing networks, and upgrading facilities for bicyclists, pedestrians, as well as enhancing access to transit in the urbanized area of Sarasota County.

The Mobility Plan served as the basis for development and subsequent adoption of a Mobility Fee that replaced road impact fees, proportionate share, and traditional concurrency. Further, the Mobility Fee was designed to promote compact, mixed-use development located in areas with transportation mobility options. The Mobility Fee rate was based on the conversion of future year vehicle miles of travel to person miles of travel. The result was a mobility fee schedule with three assessment areas featuring the higher mobility fee in suburban areas, lower fees in mixed-use developments, and the lowest fee in urban areas where improvements are multimodal based on internal capture, community capture and urban area trip lengths. A total of three benefit districts were established for unincorporated County along with separate benefit districts for the Town of Longboat Key, the City of Venice and the City of North Port. Interlocal agreements with Longboat, Venice and North Port were updated after adoption of the Mobility Fee.

More than 50 workshops and presentations were held with elected officials, development interests, and community stakeholders. The Mobility Fee was designed to comply with the dual rational nexus test and the rough proportionality test. The implementing ordinance accounted for the existing developer agreements and impact fee credit agreements. NUC subsequently developed an Administrative Manual and Administrative Cost Report for the Mobility Fee and the County's seven other impact fees. The total project budget was \$450,000.

Osceola County

FLORIDA

Reference: Mary Moskowitz, Transportation Planning Manager, One Courthouse Square, Ste. 1100, Kissimmee, Florida 34741- P: 407.742.0648 / E: Mary.Moskowitz@osceola.org

Services provided: Mobility Plan & Mobility Fee

Cost of project: 425,000

Role: Primary

Date of completion: 2016

Osceola County Mobility Plan and Mobility Fee

NUC Urban Concepts served as the Project Manager focused on technical analysis for creation of the Mobility Fee and update of the adopted Mobility Plan. The Mobility Fee was designed to complement the Mobility Plan and to ensure that the mobility fee schedule reflected the reduced transportation impacts for mixed-use developments and Transit Oriented. The Mobility Fee was based on the Avenues, Boulevards and Multi-Modal Corridors identified in the Mobility Plan.

The cost and multi-modal capacities were broken down into the three roadway classification types and based on the percentage of each facility type in the adopted Mobility Plan. The fee analysis established capacities for bike lanes, sidewalks, multi-use paths, trails and transit, in addition to motor vehicles. Vehicles Miles of

Travel were converted into Person Miles of Travel. Internal capture, community capture, and transit ridership reductions were incorporated into the Mobility Fee calculations as well as typical travel characteristics such as trip generation and pass-by trips. Most impact fees do not address or recognize the benefit derived from multimodal capacity facilities. The Complete Street concept was integrated through the Mobility Plan and Mobility Fee.

In addition, the fee focused strongly on the transportation impacts of various land uses and separated out large and small-scale offices, which have differing impacts and recognized "mom and pop" small scale retail uses have less of an overall impact than a big box retailer and neighborhood restaurants without drive-thru lanes have a reduced impact versus fast food establishments. Mixed-Use Developments received a 25% community capture reduction up front in recognition of the many positives derived from both a transportation and land use perspective. Transit Oriented Developments located along SunRail received a 25% internal capture reduction and a 25% transit ridership reduction due to the capacity from SunRail.

Significant stakeholder outreach was performed with the development community and public engagement. Various funding sources were identified and incorporated into the mobility fee calculations. The Mobility Fee was designed to comply with the dual rational nexus test and the rough proportionality test. The Mobility Fee streamlined the private development mitigation process through implementation of a one-time fee to replace transportation concurrency, road impact fees and proportionate share. An administrative manual and administrative fee were also developed as part of the process. The overall budget was \$425,000.

City of Palm Beach Gardens

FLORIDA

Reference: Natalie Crowley, AICP, Director of Planning & Zoning, 10500 N Military Trail, Palm Beach Gardens, FL 33410 - P: 561.799.4243 / E: ncrowley@pbgfl.com

Services provided: Mobility Plan & Mobility Fee

Cost of project: 200,000

Role: Primary

Date of completion: 2018

Palm Beach Gardens Mobility Plan & Mobility Fee

NUC has served as the Project Manager for development of the mobility plan and mobility fee. The first step was assisting the City with the Evaluation and Appraisal Report (EAR) process and the development of updates to the Future Land Use, Transportation, and Capital Improvement Elements of the Comprehensive Plan. The updates included establishing the Legislative Intent in the Comprehensive Plan for a Mobility Fee, based upon an adopted Mobility Plan, to replace transportation concurrency and both Palm Beach County's and Palm Beach Gardens road impact fees.

The Mobility Plan is designed around providing mobility to the future Tri-Rail Coastal Transit Station and interconnecting mixed-use developments, employment centers, regional recreation destinations and the City's Government Center. Multimodal quality of service (QOS) standards for walking, bicycling, trails and transit have been established in the Plan to guide the design of future improvements. The plan also transitions away from a segment-based roadway level of service (LOS) to an areawide road LOS.

The Plan emphasizes vastly expanding the City's Parkway System through the creation of highly visible, safe, convenient, and continuous multimodal trails throughout the City with streetscape and landscape elements. The integration of bike lanes and cycle tracks (aka protected bike lanes), both with highly visible green pavement markings with current bike facilities on State Roads, is being accomplished by repurposing existing travel lane widths. A total of four trolley circulator routes have been established emanating from the Tri-Rail Coastal station and connecting with future Mobility Hubs within major destinations. The Mobility Plan also includes the identification of numerous intersection improvements and pedestrian crosswalk enhancements coordinated with the City's Public Works, Police, and Fire Rescue Departments. NUC also developed policies for Complete Streets, Mobility Hubs, future transportation technology, land use overlays, and innovative parking strategies.

The draft of the Mobility Fee Technical Report has been submitted to the City. The Mobility Fee is based upon the multimodal improvements in the Mobility Plan. The Mobility Fee, upon adoption, would replace transportation concurrency and road impact fees. The total project scope cost is \$200,000.

City of West Palm Beach

FLORIDA

Reference: Uyen Dang, PE, City Traffic Engineer, 401 Clematis St., West Palm Beach, FL 33401 - P: 561.345.1682 / E: kudang@wpb.org

Services provided: Mobility Plan & Mobility Fee

Cost of project: 500,000

Role: Primary

Date of completion: 2018

West Palm Beach Mobility Plan and Mobility Fee

NUE Urban Concepts, LLC. (NUC) worked with the City of West Palm Beach to update the goals, objectives and policies in the Transportation, Land Use, Capital Improvement and Downtown Elements of the Comprehensive Plan. The amendment establishes the legislative intent to adopt mobility plans and mobility fees as a replacement for transportation concurrency, proportionate share and road impact fees and to lay the foundation for allowing and regulating micro-mobility and new mobility technologies. The Comprehensive Plan update also included policies to decouple parking from development and establish a parking offset fee to

fund trolley transit.

The Mobility Plan features reimagining the Downtown transportation system and shifts the focus of providing mobility from motor vehicles towards people walking, bicycling, riding transit, taking shorter vehicle trips and using new mobility technologies. The mobility plans identify the repurposing of existing rights-of-way from parking and moving cars towards providing shared streets, protected bike lanes, dedicated transit lanes for trolleys, buses and autonomous micro transit vehicles and high-occupancy lanes for use by transit, transportation network companies (such as Uber and Lyft) and autonomous vehicles used for the pooling of trips.

The Mobility Fee is based upon the projected increase in development and person trips within Downtown West Palm and is intended to replace County road impact fees and Transportation Concurrency Exception Area (TCEA) policies in the Comprehensive Plan. NUC has developed new areawide roadway level of service (LOS) standards and multimodal quality of service (QOS) standards to replace segment-by-segment roadway LOS standards as part of the Mobility Fee.

NUC has worked with City Staff to eliminate (decouple) the requirement that new development and redevelopment provide on-site surface and garage parking. NUC also worked with Staff to establish two-tiered maximum parking thresholds. For developments that provide on-site parking above the 1st Tier, they will be required to pay a parking off-set fee to fund the trolley transit service identified in the Mobility Plan and to implement Transportation Demand Management (TDM) strategies. The overall project funds allocated for the various mobility initiatives totaled \$500,000.

Tallahassee / Leon County

FLORIDA

Reference: Julie Conn-Christesen, AICP, Senior Planner, 301 S Monroe St., Tallahassee, FL 32301 - P: 850.891.6433 / E: Julie.christesen@talgov.com

Services provided: Alternative Mobility Funding System Study

Cost of project: \$365,000

Role: Primary

Date of completion: 2018

Tallahassee and Leon County Alternative Mobility Funding System Study

NUE Urban Concepts, LLC. (NUC) was the project manager conducting an Alternative Mobility Funding System Study (AMFSS) for the City of Tallahassee and Leon County. The City and County currently implement transportation concurrency based upon a tri-party Memorandum of Agreement with the Florida Department of Transportation in 2009. Since the Agreement, the Florida Legislature has abolished state-mandated transportation concurrency and made it optional for local governments.

The AMFSS has been separated into two phases. The first phase, which has been finalized, was to review existing land use and transportation plans and studies, conduct significant stakeholder interviews and public outreach, project future growth and evaluate other alternative mobility funding systems developed by other local governments in Florida. The analysis also reviewed vehicles miles of travel and person miles of travel data and trip and travel characteristics of existing development. The study undertook an analysis of the existing roadway level of service and multimodal quality of service.

The recommendation from the first phase of the AMFSS is the development of a Tiered Mobility Fee Assessment Areas, based upon to-be-developed Mobility Plans, with improvements based upon needs and the establishment of multimodal quality of service (QOS) standards and area-wide road level of service (LOS) standards. The first tier will feature multimodal improvements that focus on improving safety, connectivity, continuity, visibility, and enjoyment for people walking, bicycling, and riding transit. The second tier will feature multimodal and intersection improvements with an emphasis on promoting infill, redevelopment, and improving conditions for people walking and bicycling. The third tier will feature new and wider roads designed as Complete Streets with an emphasis on developing a more interconnected grid and encouraging mixed-use developments.

The AMFSS is a unique undertaking as it seeks to build a streamlined, integrated and seamless development mitigation system between the City and the County to replace the existing transportation concurrency system within the City and the County. The first part of the study was for \$100,000. The second part of the study has \$265,000 budgeted.

ESRP

Genesis Planning & Development Group, Inc.

FLORIDA

Reference: Bo Medred, President, 5972 River Forest Circle, Bradenton, FL 34203 - P: 941.374.5844 /

E: robertbomo@aol.com

Services provided: Various transportation studies within Sarasota County and Manatee County including several mid-term/long-term analyses in connection with proposed Comprehensive Plan Amendments. Most of these analyses required the use of different land-use scenarios (to represent the “most-intense” land-use combinations under proposed Future Land Use designations) and significant travel-demand modeling.

Role: Primary

Date of completion: Jun 2016 – Dec 2018

Murphy Planning

Lee County

FLORIDA

Reference: Mary Gibbs, AICP, Director of Community Development, P: 239.221.5036 /

E: gibbs@estero-fl.gov

Services provided: Impact fee studies and impact fee schedules

Role: Primary

Date of completion: 1999-2011

At Lee County, Murphy Planning was responsible for coordinating the update of all fees during the period of employment as well as the development of a school impact fee, which was challenged in Circuit Court. Murphy Planning was on the team that prepared and presented the defense. It was not necessary for Murphy Planning to present evidence or testify, but instead participate in preparing the expert witnesses for deposition, trial and rehearing.

In 2009-2011, Murphy Planning was the local lead for the County’s 2011 Evaluation and Appraisal Report (EAR). Jerry Murphy was on the team that prepared the report following extensive public engagement and outreach. Recommendations included emphasis on connectivity and a modern approach to mobility.



Tony Hairston

Project Director

Vice President (Raftelis)

AREA OF SPECIALTIES

- Utility cost of service and rate structure studies
- Bond feasibility reports
- Impact fee studies
- Alternative Water Supply Planning
- Long range financial planning and feasibility studies
- Cost analysis and cost allocation

PROFESSIONAL HISTORY

- Raftelis: Vice President (2018-present); Senior Manager (2015-2018); Manager (2012-2014)
- Public Resources Management Group (PRMG): (1998-2012)
- Federal Reserve Bank of Richmond, VA: Bank Analyst (1995-1998)

EDUCATION

- Master of Science, Economics – Florida State University (1995)
- Bachelor of Science, Economics – Florida State University (1993)

PROFESSIONAL MEMBERSHIPS

- American Water Works Association – Founding Chair of Florida Section Rates and Finance Committee
- Florida Government Finance Officers Association
- Florida Stormwater Association

CERTIFICATIONS

- Series 50 Municipal Advisor Representative

YEARS OF EXPERIENCE WITH THIS FIRM

- 7 years

PROFILE

Mr. Hairston currently serves as Vice President in Raftelis' Casselberry, FL Office. He has 20 years of experience implementing solutions for utility and other municipal clients. He has both managed and provided technical analysis on a variety of complex financial and management projects including comprehensive utility rate studies, impact fees, bond feasibility reports, and assisting numerous municipalities and utilities in addressing their rate-setting and financial planning goals. He has assisted governmental clients with projects including the creation and planning of several new wastewater utilities to protect the near shore water quality of the Florida Keys. Mr. Hairston has presented papers at the WaterReuse Foundation, Florida and Alabama/Mississippi AWWA conferences, and regional conferences such as the Tampa Bay Water Shortage Management workshop. Mr. Hairston also co-authored a chapter entitled, "Projecting Customer Demand," for the Fourth Edition of the industry guidebook, *Water and Wastewater Finance and Pricing: The Changing Landscape*.

RELEVANT PROJECT EXPERIENCE

Florida Keys Aqueduct Authority (FL)

Mr. Hairston served as Project Manager for numerous water and wastewater rate projects for the Florida Keys Aqueduct Authority since 1999. Various projects have included the bond feasibility report for the Series 2007 Water Revenue Bonds (\$53,975,000) and Series 2006 Water Revenue Bonds (\$49,700,000) along with feasibility reports for various wastewater program initiatives, development of wastewater rates in five (5) separate wastewater service areas and the eventual consolidation of wastewater rates. Mr. Hairston provided public outreach to future customers in each of these service areas and presented rates to the Aqueduct Board for adoption. Mr. Hairston conducted a comprehensive water rate and impact fee study for the Aqueduct and provided periodic updates of the water financial forecast and capital financing plan. Mr. Hairston also developed initial reclaimed water rates and financial policy for the Aqueduct's initial reclaimed water program in the Big Coppitt service area.

Volusia County (FL)

Mr. Hairston has been the Project Manager or Lead Consultant on numerous engagements with Volusia County. In 2016 Raftelis is providing an alternative water supply cost allocation analysis to the County and three nearby municipal utilities. In 2010, Mr. Hairston managed a utility rate study including a five-year financial forecast and design of potable water, wastewater, and reclaimed water rates. The County was enduring several years of stagnate growth while addressing several regulatory challenges such as alternate water supply planning and effluent disposal quality and capacity. The financial forecast element was focused on capital finance planning including the purchase of a strategic land area for the purpose of developing alternative water sources. The rate design efforts included the adjustment of base water rates to increase revenue stability, adjustments to water conservation rates including non-residential customers, wastewater rate adjustments, and reclaimed water rate alignment with potable water incentives. The proposed rates were presented to the County Council during a public workshop and again at a public hearing for adoption by resolution. Other projects provided to the County have included service area evaluations, impact fee studies, developer fee analysis, and ongoing capital finance planning.

Pinellas County (FL)

Mr. Hairston has served as Project Manager for a Utility Business Case and Rate Sustainability Study for the Pinellas County potable water, wastewater, and reuse water utility. This project is a comprehensive analysis that combines business planning with rate sustainability analysis. The rate sustainability analysis included a review of all potable water, wastewater, and reuse water rates. A pricing objectives workshop was conducted with key stakeholders in order to prioritize the rate structure pricing objectives. After a review of all monthly rates with the County, potable water and wastewater rate structures that included base charges by meter size, potable water conservation rates, and modifications to multi-family base charges were all designed and validated by the County steering committee. Relevant bill impact and comparisons were reviewed in order to gain an understanding of impacts to customers.

The business plan involved the review of various business processes and impact analysis on a number of potential process changes including conversion from bi-monthly billing to monthly billing and implementation of AMI metering infrastructure. The steering committee included staff from all utility functions including budget, operations, maintenance, field services, revenue collection, customer service representatives and management. Through a series of workshops with the County, a business case was developed that included both the financial and organization and customer service impacts to each initiative. The results of both the rate sustainability and business case were reviewed and validated by the County steering committee. Final results are scheduled for completion and presentation to the Board of County Commission in early 2015.

Emerald Coast Utilities Authority (Pensacola, FL)

ECUA has identified over \$233 million of water/wastewater capital improvements to be implemented in order to be consent order and maintain its utility infrastructure. Raftelis developed an interactive utility financial model to support ECUA's bond and provide a decision support tool for ECUA staff. The financial model provided a five year forecast, interactive dashboard, and capital funding/bond analysis features in order for ECUA to evaluate various alternative funding scenarios. Raftelis collaborated with ECUA staff to develop a strategy of bond sizing placements to complete critical capital improvements while maintaining a strong financial position. Raftelis also develop a financial feasibility report for inclusion in ECUA's official statement for the proposed Utility System Refunding Revenue Bonds, Series 2015 and provided support to ECUA's team of financial advisors.

City of Auburn (AL)

Mr. Hairston served as Project Manager on several projects with the City of Auburn (City) and the Water Works Board of the City of Auburn (AWWB). He assisted the AWWB with its drought rate policies in 2008 and 2011 in response to severe drought conditions affecting the AWWB water supplies. Mr. Hairston led a review of historical water usage patterns and recommended a phased approach for the implementation of drought rates corresponding to changing drought conditions. He also conducted comprehensive

water and wastewater rate and access fee studies on behalf of the AWWB and the City. In 2011, Mr. Hairston conducted a review of the City's solid waste residential collection rates and assisted the City in a multi-year phase of rates to better align revenues with costs while mitigating customer impacts. All studies required several public workshops and meetings with the City Council and AWWB Board and recommendations were subsequently adopted by the applicable governing bodies. Most recently in 2014 both the water and sewer rate studies were updated. In particular the water rates were reviewed for sufficiency to meet the financing requirements of a reconstruction of major water supply facilities along with rate structure options for Board consideration. The 2014 study also included a review and recommended changes to the fire protection charges to better reflect costs and ease the administration of this service by simplifying the fee structure.

Alabaster Water Works (AL)

Mr. Hairston has managed Raftelis' projects with the Alabaster Water Board. Raftelis was initially engaged by Alabaster Water Board in 2013 to review revenue sufficiency and debt service coverage associated with a recent revenue bond issue. Following this engagement, in 2014 Raftelis was retained to conduct a rate study including a review and comparison of various miscellaneous utility fees with other nearby service providers. Raftelis worked with Alabaster Water Board staff to review the actual cost of providing various services, and approaches to future service charges balancing cost and customer service. In addition to miscellaneous charges, Raftelis developed a six year financial forecast that included capital funding and water sales scenario analysis based on recent trends and possible future outcomes. Raftelis staff reviewed the financial model and various scenarios during several onsite and web based work sessions. In addition, certain rate structure options were reviewed including options to increase fixed revenue recovery. These options were presented to the Board in September 2014 and the option to increase base charge recovery was adopted by the Board in October 2014.

Daphne Utilities (AL)

Mr. Hairston managed a water and wastewater rate study for Daphne Utilities (DU). DU wanted to conduct a rate study in order to ensure a cost justified rate schedule that could be communicated to its customer base and ensure adequate and appropriate cost recovery. The rate study included several components such as: 1) Pricing Objectives Workshop: Raftelis held a kick-off meeting with utilities staff and the Board chairman to review the existing rate structure and identify the key pricing objectives of Daphne Utilities. The session included the identification of cost based rates, affordability, and revenue stability as the most important pricing objectives that the new rate structure should achieve. ; 2) Cost of Service Model and Rate Design Model: Raftelis developed a cost of service model for the water and wastewater systems, which included an allocation of administrative activities to the natural gas activities. Based on the cost of service model and the pricing objectives parameters, Raftelis developed a rate design model that included various features including the input of various minimum gallons to be included in the monthly base charge. Other parameters included readiness-to-serve factors by

meter size, billing charge components, and outside surcharges. 3) Bill Impacts and Comparisons: Based on a thorough analysis of the water and wastewater billing statistics, Raftelis was able to identify usage levels of various customer classes and indicate the potential change in monthly bills that would occur under any proposed rate structure. Also the existing and proposed bills were compared to other utility providers; and 4) Presentation: Mr. Hairston presented the study to the Board in May 2015 and the Board accepted the recommendations. Implementation is scheduled for October 2015.

City of Tuscaloosa (AL)

This City of Tuscaloosa has been experiencing rapid growth related to increasing enrolment at the University of Alabama and other factors. The City reports that this growth is placing a direct burden on City infrastructure engaged Raftelis to conduct an impact fee study in order to determine a defensible methodology and calculation of impact fees in order to recover the proportionate share of costs that growth imposes on City infrastructure. The identified infrastructure includes water, sewer, stormwater, streets/roads, police, and fire services.

Mr. Hairston is managing the first phase of this project which includes analysis and recommendations for water and wastewater impact fees and a feasibility analysis related to other potential impact fees. The completion of this first phase is scheduled for Fall 2015 with additional phases to be completed in 2016.

Village of Islamorada (FL)

The Village of Islamorada, located in the Florida Keys, is implementing a \$115 million central wastewater program by 2015 in order to comply with State of Florida mandates regarding near shore water quality. The wastewater project involves the retrofit of essentially its entire incorporated area, which is currently served by septic tanks and package plants. Mr. Hairston has served as Project Manager with regard to ongoing financial planning and wastewater rate policy for the Village. Originally, the financial model included a ten-year forecast based on the Village's planned method of delivery using the traditional design-bid-build procurement process. However, in 2010 the Village began to explore the design-build-operate (DBO) procurement process as an expedited and more cost effective approach to complete this project. The Village has also maintained two options for treatment services, including onsite wastewater treatment facilities or wholesale treatment services from a nearby special utility district. The financial forecast has evolved to include the DBO procurement method and include the two treatment options, along with additional funding and other options. The financial forecast has been used by the Village for securing \$20 million in grant funds, \$46 million in low-interest loans, and additional line of credit funding. In addition to financial forecasting and rate policy consulting, Mr. Hairston participated as a selection committee member with regard to the qualifications and selection process of the DBO procurement. Mr. Hairston led the committee member efforts regarding evaluation of the various pricing proposals submitted by qualified DBO entities, and presented the results which were accepted by the Village Council. Mr. Hairston is currently conducting a wastewater rate study for the

Village and continues to manage ongoing utility rate and financial consulting services for the Village.

City of Marathon (FL)

The City of Marathon is one of several jurisdictions located in the Florida Keys that has been mandated by the State of Florida to provide central wastewater service to its residents. The City also implemented extensive stormwater infrastructure improvements concurrent to the wastewater project. Mr. Hairston initially provided public outreach and financial and rate planning support to the City beginning in 2006. As the program became more developed, Mr. Hairston led a financial forecast study to provide the City with a planning tool for future policy decisions and loan procurement. In 2008, Mr. Hairston managed a financial feasibility study/report which was used by the City and its financial advisor to secure \$30 million of bank-qualified financing and over \$80 million of SRF loan financing for the stormwater and wastewater project. Later in 2008, Mr. Hairston led the City's initial rate study including public outreach and presentation to the City Council. The proposed rates and stormwater assessments were adopted and implemented by the City. Mr. Hairston continues to manage ongoing utility rate and financial consulting services to the City of Marathon.

Key Largo Wastewater Treatment District (FL)

Mr. Hairston has served as Project Manager for the initial wastewater rate and rate policy development for the Key Largo Wastewater Treatment District. The Key Largo Wastewater Treatment District was created by the Florida legislature in June 2002 for the purpose of constructing wastewater treatment systems in the Upper Florida Keys. In 2005, the District was nearing completion of construction in two areas and needed to establish utility rates for these areas and future wastewater service areas where additional construction was planned. Mr. Hairston led a study of the District's near and long-term revenue requirements with respect to serving these areas. Because the initial wastewater service area was relatively small, a careful analysis of potable water consumption patterns was conducted in order to reasonably forecast future wastewater billings. Initial rates were developed for the first service areas, and these rates were tested and revised in order to provide a consistent rate policy and structure as new areas were added and economies of scale were anticipated. The initial rates and financial forecast were presented to the District Board and adopted as proposed in 2005. Updates to the wastewater financial forecast were provided in 2007 and 2009 which showed that the initial rate development remained valid. The 2009 update was utilized by the District to secure \$30 million in a bank qualified loan to finalize its capital funding efforts.

City of Boca Raton (FL)

Mr. Hairston managed several projects including a utility revenue sufficiency analysis and a utility rate study for the City of Boca Raton. The rate study was completed at the time of decreasing water demand and uncertain economic conditions while significant capital improvements were being completed by the City. Rates were proposed and adopted by the City Council based on

recommendations from the rate study and subsequent presentations by Mr. Hairston. Other studies completed for the City include electric pass-through costs analysis and wastewater availability charge analysis.

City of Oviedo (FL)

Mr. Hairston has managed several projects for the City of Oviedo including an acquisition analysis of the Alafaya Utilities wastewater system (Utilities), financial feasibility report for the Series 2010A and 2010B Bonds (\$35,900,000), and ongoing financial forecasts for the City's utility system. The acquisition analysis included a review of historical Utilities' operations and several meetings with the owner's representatives and City representatives. The acquisition analysis considered the historical net revenue stream and reflected certain adjustments for operations under City ownership including a combination of benefits from management synergies as well as lost revenue due to property and franchise fee collections. The City negotiated a successful agreement for the purchase of the Utilities system and has integrated the system into the City's operations. Mr. Hairston also led utility rate studies that included new reclaimed water service to existing City potable water customers. A financial and demand model was created in order to assist the City in anticipating potable water demand reductions in response to increasing reclaimed water availability. Rate structures were recommended to the City in order to mitigate the impact of the expected loss of potable water revenue on the City's financial condition.

City of Sanford (FL)

Mr. Hairston has led numerous rate studies to assist the City in meeting several regulatory and economic challenges. Many utility capital improvement initiatives were mandated to the City over the past several years at a time when the City was enduring severe economic hardship. Mr. Hairston managed a detailed utility financial forecast in order to evaluate numerous capital improvement initiatives and sensitivity analyses regarding future conditions. A special emphasis was placed on rate phasing and avoiding large one-time rate adjustments. The financial forecast was used by City staff in budget planning and resource allocation. The financial forecast also provided the basis for several ad hoc analyses as needed by the City. Mr. Hairston presented numerous forecasts and rate recommendations to the City Commission and such recommendations have been adopted by the City. He also conducted a stormwater rate analysis for the City with an emphasis on capital planning under the existing utility billing structure.

OTHER RELEVANT PROJECT EXPERIENCE

- City of Alachua (FL) – Reclaimed Water Rate Analysis
- Alabaster Water Board (AL) – Water rate study and miscellaneous charge review
- City of Auburndale (FL) – Water and Wastewater Financial Feasibility Report
- Charlotte County Utilities (FL) – Comprehensive Utility Financial Forecasts, Impact Fees and Wholesale Water Cost Dispute Resolution
- Destin Water Users (FL) – Rate Study, Financial Planning, Resource Planning
- Enterprise Community Development District (FL) – Cost of Service Rate Study, Wholesale Cost Pass-Through Analysis
- City of Eustis (FL) – Utility Rate Studies, Business Planning, Impact Fee Studies, Stormwater Utility Rate Analysis
- Fairfax County (VA) – Wastewater Financial Forecasting and Sufficiency Studies
- City of Fort Myers Beach (FL) – Water Rate Study
- City of Groveland (FL) – Utility Rate Studies, Financial Forecasts, Utility and Municipal Impact Fee Studies
- City of Hallandale Beach (FL) – Utility Impact Fee Study, Alternative Water Supply Planning
- City of Lake Alfred (FL) – Water and Wastewater Rate Study
- Indian River County (FL) – AMI Feasibility and Business Case Analysis
- City of Lake Wales (FL) – Utility Revenue Sufficiency Analysis and Financial Model
- City of Largo (FL) – Wastewater Financial Forecast and Rate Study, Wholesale Rate Analysis
- City of Marco Island (FL) – Water and Wastewater Rate Design
- City of Margate (FL) – Wastewater Rate Study, Impact Fee Study, Alternative Water Supply Planning, Stormwater Rate Study
- City of Marianna (FL) – Utility Rate Study
- City of Mascotte (FL) – Wastewater Rate Study; Impact Fee Study
- Town of Montverde (FL) – Water Impact Fee and Rate Revenue Sufficiency Studies
- City of Minneola (FL) – Police, Fire, and Recreation Impact Fee Study
- City of Mt. Dora (FL) – Impact Fee Study, Utility Rate Study
- Town of Oakland (FL) – Water Rate Study, Impact Fees (Water, Wastewater, Police, Roads, Parks, Administrative); SRF Loan Business Plan
- City of Ocala (FL) – Utility Rate Studies; Revenue Sufficiency Analysis; Water and Wastewater Impact Fees;
- City of Oldsmar (FL) – Water Resource Planning, Utility Rate Study, Impact Fee Study, Stormwater Study
- City of Plant City (FL) – Water and Wastewater Rate Study, Solid Waste Rate Study, Stormwater Rate Study, Impact Fee Study, Financial Forecasting
- Prichard (AL), Water Works and Sewer Board of City of Prichard - Utility Revenue Sufficiency Study
- St. John River Water Management District (FL) – Alternative Water Supply Analysis and Impact on Utilities
- South Walton Utilities (FL) – Water Resource Planning, Wholesale Rate Analysis, Utility Rate Studies
- City of Titusville (FL) – Water Resource Planning
- City of Treasure Island (FL) – Wastewater Rate Study, Cost Pass-Thru Analysis
- City of West Melbourne (FL) – Utility Rate Study
- West Volusia Water Suppliers (FL) – Alternative Water Cost Allocation for cities of Deland, Deltona, Orange City and Volusia County Utilities
- City of Wilton Manors (FL) – Utility Rate Study
- City of Winter Springs (FL) – Fire Impact Fee Study

PRESENTATIONS

- Alabama Water and Wastewater Institute Annual Conference, “Rate Structures and Financial Planning” (November 2, 2015, Point Clear, AL)
- Alabama/Mississippi AWWA, “Capital Finance Planning and Communication” (October 12, 2015, Biloxi, MS)
- Caribbean Water Works Association, “Funding Central Wastewater Retrofits in the Florida Keys” (August 27, 2015, Miami, FL)
- Florida Section AWWA Fall Conference, “Practical Approaches to Finance Infrastructure Projects in the Current Market” (November 27, 2012, Orlando, FL)
- Alabama/Mississippi Section AWWA Conference, “Right Sizing the Fixed Component in Your Rate Structure” (October 15, 2012, Mobile, AL)
- -Water Reuse Foundation Annual Conference, “Valuing Reclaimed Water” (May 12, 2010, Tampa, FL)
- Florida Section AWWA Fall Conference, “Implementing Water Conservation into Rate Structure” (Dec. 1, 2009, Orlando, FL)
- Presentation to Tampa Bay Water Regional Water Shortage Management Workshop, “Drought Surcharge Rates” (May 5, 2009, Tampa FL)
- Presentation to Florida Section AWWA, “Utility Impacts/Reaction/Response to Current Economic Factors” (Water Panel, Feb. 10, 2009, Orlando, FL)

PROFESSIONAL REFERENCES**Volusia County Utilities (FL)**

Mike Ulrich, Utilities Director

P: 386 943 7027 Ext. 12724 / E: mulrich@volusia.org

Florida Keys Aqueduct Authority (FL)

Kerry Shelby, Deputy Director

P: 305 295 2230 / E: kshelby@fkaa.com

**Brunswick Glynn County
Water & Sewer Authority (GA)**

Jimmy Junkin, Director

P: 912 602 9728 / E: jjunkin@bgjwsc.org



Dwayne Guthrie PhD, AICP

Project Manager

Manager (Raftelis)

AREA OF SPECIALTIES

- Impact Fees
- Infrastructure Needs and Funding Strategies
- Fiscal Impact Analysis
- Smart Governance

PROFESSIONAL HISTORY

- Raftelis: Manager (2018-present)
- Impact Fee Manager with Manatee County, FL (2017)
- Principal with TischlerBise (2012-2017)
- Associate Professor of Practice with Catholic University of America in Washington, DC (2010-2012)
- Consultant with TischlerBise (1988-2010)
- Planner with engineering firm in Tampa, FL (1987-1988)
- Planner with Planning Commission in Tampa, FL (1979-1987)

EDUCATION

- Ph.D., in Planning, Governance, and Globalization from Virginia Tech (2007)
- M.A., in Urban and Regional Planning from University of Florida (1979)
- B.A., in Education from University of Florida (1977)

REGISTRATIONS & AFFILIATIONS

- Member, American Institute of Certified Planners (AICP)
- American Planning Association
- Arizona Chapter of the American Planning Association
- Institute of Transportation Engineers

YEARS OF EXPERIENCE WITH THIS FIRM

- 1 year

PROFILE

Dr. Guthrie is currently a Manager with Raftelis. Prior to joining Raftelis, he served as the Impact Fee Manager for Manatee County, Florida. During 2017, he drafted an extensive revision to the Land Development Code related to impact fees, along with an Impact Fee Procedures Manual. The latter provides clarification of impact fee credits necessary to account for construction of major roads by developers. For a major portion of his career, Dr. Guthrie worked as a planning consultant for cities and counties across America. He directly interacted with top administrators and elected officials regarding best practices for impact fees, infrastructure funding, placemaking, and redevelopment strategies. Dr. Guthrie primarily assists local governments with the challenges of growth management, infrastructure planning, and funding strategies. He specializes in demographic analysis, development impact fees, capital improvements plans, fiscal evaluations, and consensus building with stakeholders. During the preparation of impact fee programs for approximately 140 local governments in 27 states, Dr. Guthrie helped community and government leaders make tough fiscal choices, while successfully managing all aspects of the consulting process. Dr. Guthrie's research interests include: quantitative methods, spatial thinking, and smart governance (i.e. the interaction of land use, infrastructure, and revenue strategies). His career began as a public sector planner in Florida. Dr. Guthrie has 38 years of experience as a professional planner. His career includes 29 years of work as a planning consultant and 9 years of public sector experience.

RELEVANT PROJECT EXPERIENCE

For these projects, professional planners provided comprehensive service from start-up to conclusion, for each client. Typical assignments require 3-6 months and include staff interviews, data gathering, technical analysis, report writing, stakeholder meetings, and presentations at public forums. The following work products provide a representative sample.

1. **Impact Fee Update for Manatee County, Florida.** Dr. Guthrie updated fees for parks, law enforcement, and public safety; created a new impact fee for libraries; and significantly revised the existing road impact fee. The 2015 multimodal transportation fee includes funding for complete streets (all modes), with unique capital plans and fee schedules by four geographic areas.
2. **Implementation of How Will We Grow?** For Manatee County, Dr. Guthrie provided technical memorandums and a staff presentation on infrastructure funding strategies and the importance of transportation and land use interactions.
3. **Transportation Impact Fees and Excise Taxes for Boulder, Colorado.** Due to open space easements surrounding the City, Boulder is infilling and redeveloping. Dr. Guthrie provided a literature review and best practices summary regarding walkable urbanism and multimodal transportation funding solutions. He also drafted reports on the growth share of transportation capital and operating costs.
4. **Transportation Funding Strategy for the City of Baltimore, Maryland.** Alternative funding strategies for transportation needs were evaluated, with specific examples derived for a redevelopment area located along the inner harbor, to the southeast of downtown.
5. **Alternative Student Generation Rates for the City of Chesapeake, Virginia.** This report includes a brief literature review and transferable method for deriving jurisdic-

tion-specific multipliers, by housing unit type and bedrooms, using American Community Survey PUMS data.

6. **Cost of Port-Related Services in Garden City, Georgia.** Given its location adjacent to the Port of Savannah, public safety demands are a fiscal burden on the City. This study documents the cost of port-related services and recommends a unique reimbursement agreement based on container shipments through the port.
7. **Transportation Impact Fees for the State of Delaware.** An innovative feature of this study is the use of GIS analysis to derive transportation fees for policy areas identified in the State Plan. The fees are based on vehicle miles of travel, derived from the long-range transportation model.

SPECIALIZATIONS

- **Impact Fees.** Dr. Guthrie has completed fee studies on the following types of public facilities: water and sewer systems, roads, schools, parks, fire-rescue, law enforcement, stormwater management, libraries, general government facilities and electric utility systems. Impact fee assignments for private sector clients include successful challenges of fees on behalf of builder/developer associations. Dr. Guthrie continues to improve “best practices” with customized demographic multipliers by type or size of housing, geographic variation in fees to implement planning policies, and consensus building with private sector stakeholders.
- **Infrastructure Needs and Funding Strategies.** Dr. Guthrie has prepared infrastructure plans and funding strategies for clients in Maryland, South Carolina, Georgia, Florida, Arizona, Colorado, Utah, Idaho, and Montana. As part of these studies, he documents local level of service standards, capital and operating cost factors, and projected revenue sources to ensure sufficient funding for implementation.
- **Fiscal Impact Analysis.** In contrast to impact fees that only consider infrastructure funding, fiscal studies evaluate cash flow to the public sector for all revenues and costs. Dr. Guthrie has conducted fiscal evaluations of specific development proposals, alternative development patterns, and various land-use prototypes.
- **Smart Governance.** Dr. Guthrie promotes smart growth using revenue strategies and pricing policies. He has pioneered innovative methods for analyzing census data to support higher fees for larger housing units and reducing fees for infill development located in urban centers. Dr. Guthrie helps communities implement marginal cost pricing that varies by geographic area, and charges per acre to encourage efficient land use.

TEACHING AND RESEARCH

Dr. Guthrie taught graduate planning courses at Catholic University of America in Washington, DC and at the Alexandria campus of Virginia Tech. His courses include Introduction to Planning Principles, Transportation and Land Use, Planning Techniques, and Growth Management. His doctoral dissertation, titled “Understanding Urban, Metropolitan, and Megaregion Development to Improve Transportation Governance” documents the expected

geographic extent of commuter sheds in 2030 for large metropolitan areas within the continental United States. Nine transportation megaregions were identified based on specific criteria, including global gateways that facilitate movement of people and goods, contiguous commuter sheds with urban centers spaced a suitable distance for high-speed rail service, and end-point commuter sheds projected to add at least one million persons and jobs from 2000 to 2030. The dissertation recommends a new paradigm for transportation governance with scale-dependent decision-making and funding strategies.

PUBLICATIONS

- *Next-Generation Transportation Impact Fees*, with Carson Bise, Planning Advisory Service Memo Jan/Feb 2015, American Planning Association.
- *Introduction to Infrastructure Financing*, with Paul Tischler, IQ Service Report 1998, International City/County Management Association.

SAMPLE SPEAKING ENGAGEMENTS

- *Alternative Transportation Funding Techniques*, Growth & Infrastructure Consortium
- *Funding the Infrastructure Gap*, American Planning Association National Conference
- *Reasonable Impact Fees*, National Association of Home Builders Conference
- *Do Impact Fees Fit Your Comprehensive Revenue Strategy?* Rocky Mountain Land Use Institute Conference

PROFESSIONAL REFERENCES

City of Coral Gables (FL)

Charles Wu, Assistant Director Development Services
P: 305 460 5244 / E: cwu@coralgables.com

Manatee County (FL)

John Osborne, Planning Official
P: 941 745 4501 x6825 / E: john.osborne@mymanatee.org

City of Tempe (AZ)

Julie Hietter, Public Works Manager
P: 408 350 8412 / E: julie_hietter@tempe.gov



Joe Williams

Other Impact Fees

Senior Consultant (Raftelis)

AREA OF SPECIALTIES

- Utility cost of service and rate structure studies
- Impact fee studies (Utility and Municipal)
- Bond feasibility reports
- Long range financial planning and feasibility studies
- Utility rate surveys

PROFESSIONAL HISTORY

- Raftelis: Senior Consultant (2018-Present); Consultant (2015-2017); Associate Consultant (2013-2014); Analyst (2012)

EDUCATION

- Master of Business Admin – University of Central Florida (2018)
- Bachelor of Science in Business Administration (Financing & Accounting) - University of Central Florida (2012)

YEARS OF EXPERIENCE WITH THIS FIRM

- 6 years

PROFILE

Mr. Williams has six years of experience in utility financial and rate consulting. His expertise lies in the areas of research, compiling and analyzing data, and computer financial and rate model development. Mr. Williams was also involved in conducting the comprehensive 2012, 2014, and 2016 *Florida Water and Wastewater Rate Surveys* of local government utilities throughout Florida.

RELEVANT PROJECT EXPERIENCE

City of Marathon (FL)

Raftelis is currently engaged with the City of Marathon to provide a financial forecast for the Wastewater and Stormwater Utilities. Mr. Williams assisted with the model development, which includes highly detailed budget projections due to operating contracts and evolving customer characteristics in addition to revenue generation, reserve balances, capital improvement funding. He also played an integral role in the development of the council presentation materials and the combined system revenue sufficiency report.

Pinellas County Utilities (FL)

Mr. Williams is assisting with development of the long term Revenue Sufficiency and Sustainability Forecast. This includes rate design for the water and sewer systems that targets enhanced revenue stability, strong equity amongst various customer classes, and continuity between the systems. He is also assisting with incorporating scenarios developed in the Business Case into the Revenue Sufficiency Forecast.

Florida Keys Aqueduct Authority (FL)

Mr. Williams has been involved with several projects for the Florida Keys Aqueduct Authority (FKAA) since 2013 including a system development charge study, a comprehensive review of existing miscellaneous charges and a wastewater sufficiency analysis for a greatly expanded customer base. Several options for updating miscellaneous charges were reviewed including (i) indexing of existing charges and (ii) an activity-based cost approach.

St. Johns County (FL)

Raftelis has been engaged with the St. Johns County Utilities Department for many years and has completed studies ranging from water and wastewater impact fee studies for the Main and Ponte Vedra systems to bond feasibilities. Recently, Raftelis was engaged to work closely with the utility to effectively obtain funding for major wastewater system improvements in the Ponte Vedra system, which is significantly smaller than the Main system. Through combining the two utilities into a single enterprise fund, while maintaining separate divisions, the Ponte Vedra system was able to refund outstanding bonds and achieve savings, obtain new money, and release debt reserve funds all while minimizing the necessary level of rate adjustments.

City of Tavares (FL)

Raftelis has been engaged with the City of Tavares for multiple studies and continuing service contracts. Mr. Williams has been assembling, reviewing, and compiling key data required for an ongoing feasibility review to fund stormwater facilities. This has involved modeling the financial impact various funding alternatives will have on cost recovery through rates, fees, and charges. He has also assisted with the research and data acquisition for rate and impact fee comparisons of surrounding utilities which are used in presentations and study reports.

Volusia County (FL)

Raftelis has assisted the County with various studies since 2012. Mr. Williams played a key role in data collection, modeling, and meetings with key staff for a net present value calculation of the potential sale of a service area within the County. Raftelis was also retained by the County to determine the feasibility of acquiring a wastewater system within the County in order to provide better and higher quality service to the customers.

Winter Haven (FL)

Raftelis has been engaged by the City of Winter Haven to develop an analysis for potential Fire Assessments within the City at targeted revenue levels. Mr. Williams is leading in the development of the model and will be tasked with generating various assessment roles for multiple entities including the City, the City's mailing agency for mailed notices to all parcels as mandate by Florida state statutes, and to the Polk County property appraiser and tax collector for inclusion on the annual tax bills.

City of Auburn (AL)

In 2014 Raftelis was hired by the City of Auburn (City) and the Water Works Board of the City of Auburn (AWWB) to complete water and sewer studies. In order to review future revenue sufficiency of the rates, historical consumption trends were analyzed in conjunction with meeting the financing requirements of major water supply facilities in the capital plan. The study also included recommended changes to the fire protection charges as well as a review of the miscellaneous charges.

Daphne Utilities (AL)

Mr. Williams assisted with the model, presentation and report development for this project, which includes a full cost of service allocation along with a rate design element. The model is based on comprehensive customer statistics, individual line item budget analysis and cost allocations based on fixed assets, peaking factors, etc.

City of Phoenix (AZ)

Mr. Williams is the Lead Analyst for an on-going Biennial Audit of Land Use Assumptions, Infrastructure Improvements Plan and Development Impact Fees Study being completed for the City of Phoenix. The City assesses libraries, parks, fire protection, police, major arterials (roadway facilities), stormwater, water, wastewater and water resource development impact fees, implemented in 2015 in compliance with the requirements of Arizona Revised Statutes (ARS §9-463.05). The water resource development impact fee is assessed throughout the City while the eight other development impact fees are assessed within growing areas in the periphery of the City that vary within eight different service areas. Mr. Williams is leading project analysis working directly with City staff and the Raftelis Project Manager to audit revenues and expenses compared to the adopted fee schedules, IIP-eligible improvements, and reviewing the land use assumptions forecast as well as documenting study results. Study findings will be documented within a draft and final report. This study was initiated in December 2016 and is anticipated to be completed in April 2018.

City of Goodyear (AZ)

Mr. Williams is serving as Lead Analyst for a utility and non-utility development impact fee study being completed for the City initiated in June 2017. The study includes developing land use assumptions, an infrastructure improvements plan and an update to the City's fire, police, street, park, water, and sewer system development impact fees pursuant to Arizona Revised Statutes (ARS §9-463.05). Mr. Williams is working closely with City staff and the Raftelis project team to complete analysis, evaluate impact fees and development cash flow requirements over the 10-year planning period. The study is anticipated to be completed with public hearings and required reports completed in 2018 and a January 1, 2019 effective date.

OTHER RELEVANT PROJECT EXPERIENCE

- Alabaster Water Board (AL) – Water Rate Study
- City of Alachua (FL) – Reclaimed Water Study
- City of Atwater (CA) – Water Rate Study
- City of Auburndale (FL) – Revenue Sufficiency Study
- City of Bartow (FL) – Fire Fees
- Bonita Springs Utilities (FL) - Water and Wastewater Rate Study
- Brunswick-Glynn County JWSC (GA) - Water and Wastewater Rate Design and Financial Forecast
- Cassatt Water Company (SC) – Water Rate Study
- Charlotte County (FL) – Dispute Resolutions
- City of Clarksville (TN) – Water and Wastewater Financial Planning
- City of Clearwater (FL) – Utility Customer Service Efficiency Review
- Emerald Coast Utilities Authority (FL) – Water and Wastewater Bond Feasibility
- City of Fort Walton Beach (FL) – Water, Wastewater and Stormwater Rate Study
- Indian River County (FL) – AMR/AMI Feasibility Study
- City of Groveland (FL) – Utility Rate Study
- Village of Islamorada (FL) – Wastewater Update
- City of Margate (FL) – Development of a Utility Financial Model
- Town of Oakland (FL) – Water Rate Study | Wastewater Rate Development | Municipal Impact Fee Study | Utility Impact Fees
- Port St. Lucie (FL) – Water, Sewer and Reclaimed Water Rate Study | Water and Sewer Impact Fee Update
- City of Sanford (FL) – Municipal Impact Fee Study
- Sullivan's Island (SC) - Water and Wastewater Rate Study
- City of Winnipeg – Cost of Service Analysis

PROFESSIONAL REFERENCES

Volusia County Utilities (FL)

Mike Ulrich, Utilities Director

P: 386 943 7027 Ext. 12724 / E: mulrich@volusia.org

Florida Keys Aqueduct Authority (FL)

Kerry Shelby, Deputy Director

P: 305 295 2230 / E: kshelby@fkaa.com

**Brunswick Glynn County
Water & Sewer Authority (GA)**

Jimmy Junkin, Director

P: 912 602 9728 / E: jjunkin@bgjwsc.org



Robin Chacko CPA

Other Impact Fees Consultant (Raftelis)

AREA OF SPECIALTIES

- Rate modeling and forecasting
- Utility impact fee studies
- Data collection and analysis
- Utility rate surveys

PROFESSIONAL HISTORY

- Raftelis: Consultant (2018-present);
Associate Consultant (2016-2017);
Intern (2012-2015)

EDUCATION

- Master of Science in Accounting –
University of Central Florida (2016)
- Bachelor of Science in Business
Administration (Accounting) –
University of Central Florida (2014)

YEARS OF EXPERIENCE WITH THIS FIRM

- 7 years

PROFILE

With a background in accounting, Mr. Chacko initially joined Raftelis in 2012 as an intern and then became full-time upon graduating from the University of Central Florida in July 2016. Mr. Chacko has contributed to the development of financial models and conducted analyses for water and wastewater rate studies, utility impact fee studies, bond feasibility studies, and water and wastewater rate surveys.

RELEVANT PROJECT EXPERIENCE

Volusia County (FL)

Completed tasks on multiple projects for Volusia County including a financial evaluation model and analysis in the County's northeast peninsula service area. This task included development of a financial model with custom built scenarios based on different ownership assumptions and service area characteristics.

St. Johns County (FL)

Developed utility bill frequency analysis by customer class based on detailed billing reporting. Other tasks include revenue analysis, rate comparisons, and impact fee comparisons.

Florida Keys Aqueduct Authority (FL)

Developed rate and impact fee comparisons for comparable service providers. Other billing and data analysis performed on multiple studies.

Moss Creek Owners Association, Inc. (SC)

Mr. Chacko served as an Associate Consultant on a water and wastewater rate study for the Water Oak Utility (WOU) which is a department of the Moss Creek Owners Association. The project included a review of the WOU's rates necessary to meet the projected revenue requirements of the combined water and wastewater utility operations. As part of the study, Mr. Chacko developed a customer billing frequency analysis and financial rate model. He also assisted in the creation of the tables and graphs used in the final written report to Moss Creek.

City of Largo (FL)

Mr. Chacko served as an Associate Consultant on a project for the City of Largo (City) to provide wastewater rate and impact fee and stormwater rate consulting services. As part of the study, Mr. Chacko developed a bill frequency analysis to study the available historical water consumption of the City's different customer types in order to better understand the consumption patterns for each type of customer.

City of DeLand (FL)

Mr. Chacko served as an Associate Consultant on a project for the City of DeLand (City) to provide a comprehensive utility rate study. The major components of the study included: ensuring the water and sewer system cover its operation and maintenance costs; ensuring sufficient funding for capital improvements and alternative water supply projects; and maintaining adequate operating reserves. As part of the study, Mr. Chacko developed a financial model with the capability to provide recommendations of rate structure adjustments that achieved the City's rate objectives.

SURVEYS

Florida Water and Wastewater Rate Survey

Mr. Chacko served as the Project Manager for the 2016 and 2014 Florida Water and Wastewater Rate Survey. The Florida survey focused on residential potable water/wastewater bills and rate structures of public utilities. Mr. Chacko helped lead the data collection, analysis, and preparation of the final survey report.

2016 Water and Wastewater Rate Survey

Mr. Chacko is currently assisting in the firm's 2016 National Water and Wastewater Rate Survey. The biennial survey is completed by Raftelis in conjunction with the American Water Works Association. Mr. Chacko will help to lead the data collection, analysis, and preparation of the 2016 survey.

OTHER RELEVANT EXPERIENCE

- Charlotte County (FL) – Sewer Master Plan
- City of Auburn (AL) – Solid Waste Rate Study
- City of Auburndale (FL) – Bond Feasibility Study
- City of Belleview (FL) – Water and Sewer Rate Study
- City of Mascotte (FL) – Municipal Impact Fee Study
- City of Zephyrhills (FL) – Utility Rate Study
- Indian River County (FL) – Comprehensive Rate and Impact Fee Study
- Pinellas County Utilities (FL) – Utility Business Case and Rate Sustainability Study
- Town of Montverde (FL) – Municipal Impact Fee Study

PROFESSIONAL REFERENCES

City of Zephyrhills (FL)

John Bostic, Utilities Director

P: 813 780 0008 / E: jbostic@ci.zephyrhills.fl.us

City of Belleview (FL)

Marge Strausbaugh, Finance Director

P: 352 245 7021 ext. 2117 / E: mstrausbaugh@belleviewfl.org

Alabaster Water Board (AL)

Laura Koon, Director

P: 205 663 6155 Ex. 14 / E: lkoon@alabasterwater.com



Jonathan Paul AICP

Mobility Fee

Principal (NUE Urban Concepts)

EDUCATION

- University of South Florida, MA Public Administration (2002)
- University of Florida, MA Urban & Regional Planning (2000)
- University of South Florida, BA History (1997)
- Florida State University, BS Social Science (1995)

CERTIFICATION

- American Institute of Certified Planners No. 017909
- Certified Public Manager (2010)

PROFESSIONAL MEMBERSHIPS

- American Planning Association
- Congress for New Urbanism
- Chairman – Celebration Pointe CDD No. 1
- Institute of Transportation Engineers
- People for Bikes
- Strong Towns

YEARS OF EXPERIENCE

- 20 years

PROFILE

Jonathan has over 20 years of land use, transportation planning and impact/mobility fee experience. Mr. Paul founded NUE Urban Concepts to work with local governments to develop innovative land use concepts and mobility plans, implement complete and living street policies and establish creative techniques to fund mobility improvements. Jonathan worked as a Principal Planner with Hillsborough County and the Hillsborough County MPO focusing on transportation mobility, concurrency and impact fees. He worked for several years as the Concurrency and Impact Fee Manager for Alachua County where he was a principal author of Alachua County's award winning Mobility Plan, the 1st Mobility Plan and Mobility Fee adopted in Florida. Mr. Paul was the Interim Transportation Planning Director for Sarasota County for 3 years leading concurrency, transportation planning and impact fee administration. Jonathan is the lead land use and transportation planner for Celebration Pointe, the 1st Transit Oriented Development in Alachua County. He served as an adjunct professor at the University of Florida teaching transportation planning. Mr. Paul has served on numerous land use and transportation statewide technical review committees.

EMPLOYMENT EXPERIENCE

Principal - NUE Urban Concepts: Gainesville, FL - 2011 to Present

NUE Urban Concepts works with local governments and private entities to develop innovative land use and transportation mobility and transportation funding strategies to create vibrant communities. NUE Urban Concepts works with local governments to develop Mobility Plans and Mobility Fees and conduct Evaluation and Appraisal Reports (EAR) and updates to Traffic Impact Analysis requirements. NUE Urban works with both local governments and private developers with Comprehensive Plan Amendments, Land Development Code Updates and Complete Street Designs, Due Diligence, Entitlements, Rezoning, Master Sign Plans, Parking and Curb Management Plans, Open Containers, Development Plan Approvals and Traffic Impact Analysis. NUE Urban Concepts also conducts detailed Traffic Impact Analysis for Mixed-Use Developments and a variety of single use retail, office, hotel and residential developments for FDOT permits, Comprehensive Plan Amendments, Rezoning, and Development Plan approvals. NUE Urban Concepts also develops, updates and administers park, fire, ems, law, justice, government, library and road impact fees.

Interim Transportation Planning Director / Consultant Sarasota County Public Works Department: Sarasota County, FL - 2013 to 2015

Managed the Transportation Planning and Impact Fee Divisions. Coordinated short term and long-range transportation planning projects. Updated the Road Impact Fee and assisted with the daily administration of Impact Fees. Reviewed traffic impact analysis for DRI's, Comprehensive Plan Amendments and Rezoning. Worked on developer's agreements with Lakewood Ranch DRI, University Town Center and Palmer Ranch. Conducting Independent Cost Estimate (ICE) and Comprehensive Operational Analysis (COA) for Sarasota County Area Transit. Responded to the Federal Transit Administration Small Starts application for Bus Rapid Transit between Downtown Sarasota and Downtown Bradenton. Conducted the detailed Traffic Impact Analysis at the Fruitville Road and Interstate 75 Interchange for the Fruitville Initiative involving six (6) different property owners, of which Sarasota County was one. Coordinated with FDOT and Manatee County on the Diverging Diamond Interchange at Interstate 75 and University Parkway. Assisted with updates, review and studies prepared by the Sarasota / Manatee MPO.

Adjunct Faculty - University of Florida: Gainesville, FL - 2011 to 2015

Taught Graduate Level Transportation Planning & Policy in the College of Design, Construction & Planning at the University of Florida. Focused on multi-modal transportation planning, transportation finance, multi-modal roadway cross-section design, level-of-service analysis, mobility fees, impact fees, trip generation, travel demand modeling, and site planning and traffic analysis.

**Concurrency & Impact Fee Manager
Alachua County Growth Management Department:
Gainesville, FL - 2005 to 2011**

Managed the Transportation Planning, Concurrency, Impact Fee and Geographic Information Systems (GIS) Divisions. Authored comprehensive plan and land development regulations for Transit Oriented and Traditional Neighborhood Development Policies. Developed the framework for a multi-modal transportation system to enable mobility via walking, biking, transit and motor vehicles. Established a unique program to evaluate roadway level of service (LOS) on an Areawide and district basis. Developed LOS standards for transit, bicycle and pedestrians. Developed 1st Road Impact Fee that separated urban and rural residential and an upfront reduction for Traditional Neighborhood Developments. Reviewed traffic impact analysis for DRIs, CPAs, Rezoning and Development Plans. Maintained County's Roadway Level of Service Report.

**Principal Planner - Hillsborough County Planning
Department: Tampa, FL - 2003 to 2005**

Conducted methodology meetings & reviewed developer produced traffic impact analysis for rezoning, concurrency, DRI's, developer agreements, and impact fee studies. Assisted with update and administration of the Road Impact Fee. Maintained the Hillsborough County Roadway Level of Service Report & Maps. Reviewed impact of Developments of Regional Impact from Hillsborough, Manatee, Pasco, Pinellas and Polk. Led the public-private US 301 widening project that included more than 15 separate developers, the County, the Florida Department of Transportation (FDOT) and the federal government to widen ten miles of US 301, 20 years before it was to be funded in the MPO Cost Feasible Plan.

**Senior Planner - Hillsborough County MPO:
Tampa, FL - 2001 to 2003**

Worked on updates to the Long-Range Transportation Plan. Maintained the Hillsborough County Roadway Level of Service Report. Led the effort to reduce Nebraska Avenue from a four-lane undivided road to a two-lane divided road with a center turn lane, bike lanes and wider sidewalks in attempt to revitalize the corridor and support the renaissance occurring in adjacent neighborhoods. Worked on Public Involvement Plans and updates to Transportation Improvements Program. Conducted Travel Demand Modeling and Geographic Information Systems Analysis. Lead Corridor Studies and multi-modal level of service analysis. Worked with Hillsborough County on identifying opportunities to reduce pavement widths during resurfacing projects to add bicycle lanes. Provided technical support to the Chairs Coordinating Committee, which includes the Sarasota / Manatee MPO.

**Project Planner - Sprinkle Consulting (SCI):
Tampa, FL - 2000 to 2001**

Developed bicycle and pedestrian master plans & maps for FDOT, MPO's, Cities, and Counties. Conducted traffic analysis and level of service analysis for automobiles, transit, bicycles, and pedestrians. Worked on the refinement of the pedestrian and bicycle level of service models and integrating bicycle, pedestrian and transit LOS into the FDOT Generalized Tables and ART-Plan software. Instructed individuals and organizations on using multi-modal LOS software. Presented at public, state and national workshops and conferences. Developed Gainesville / Alachua County Bicycle and Pedestrian Master Plan and the Hillsborough County Sidewalk Master Plan.

**Planner - Berryman & Henigar: Ocala, FL -
1999 to 2000**

Developed a land development code for St. Johns County and the City of Cocoa. Revised the City of Ocoee's land development code. Created GIS maps for the Flagler and Nassau County Comprehensive Plans. Led meeting with City and County Staff to review policies and regulations and coordinate public outreach.

**Research Assistant - University of Florida:
Gainesville, FL - 1999 to 2000**

Researched Traditional Neighborhood Development and innovative land development practices. Conducted an extensive review of the City of Orlando's Development and Transportation Policies. Interviewed residents of downtown Orlando Neighborhoods & transportation professionals. Developed a report for the FDOT on the relationships between Traditional Neighborhood Development in downtown Orlando and Orlando residents' work and non-work travel patterns.

**Planning Intern - Bricklemyer, Smolker & Bolves,
PA: Tampa, FL - 1997 to 1998**

Conducted field research for DRIs, Comprehensive Plan Amendments, Rezoning and Development Plans. Filed applications with the City of Tampa and Hillsborough County. Attended neighborhood workshops and County Commission Meetings. Prepared summary reports and reviewed plans for consistency with Florida Statutes.

RELEVANT PROJECT EXPERIENCE

**City of Tallahassee / Leon County Alternative
Mobility Funding System Study (AMFSS)
Tallahassee, FL - Phase 1: 2018**

NUE Urban Concepts was the project manager for the AMFSS. The AMFSS was undertaken to evaluate replacements for the existing transportation concurrency management system. The AMFSS included an in-depth evaluation of Alternative Concurrency Systems throughout Florida. The Study also evaluated existing plans and projected future growth. The Study recommendation is to develop a tiered mobility fee based upon a multimodal mobility plan. The Capital Region Transportation Planning Agency Connections 2040 Regional Mobility Plan and the regional travel

demand model were evaluated to identify mobility improvements and future travel demand.

City of West Palm Beach Mobility Plan, Mobility Fee & Parking Management Strategies West Palm Beach, FL - 2018

NUE Urban Concepts worked with City Staff to develop a mobility plan and mobility fee for the City's Downtown. The mobility plan and fee will replace the transportation concurrency exception area (TCEA) policies and Palm Beach County's roadway impact fee. Required parking minimums were eliminated, tired parking maximums were established and a parking offset fee was developed to fund trolley transit service for developments that exceeded tiered maximums. The Palm Beach County Transportation Planning Agency (TPA) 2040 LRTP and regional travel demand model were evaluated to identify mobility improvements and future travel demand.

City of Palm Beach Gardens Mobility Plan & Mobility Fee - Palm Beach Gardens, FL - 2018

NUE Urban Concepts was the project manager for development of a mobility plan for the City and working with the City during the Evaluation and Appraisal Report process to establish legislative intent in the Comprehensive Plan to develop a mobility plan and a mobility fee. A draft mobility fee technical report has been prepared. The mobility fee, upon adoption, would replace transportation concurrency, Palm Beach County and Palm Beach Gardens roadway impact. The Palm Beach County TPA LRTP and travel demand model were evaluated to identify mobility improvements and future travel demand.

City of Miami Beach Mobility Fee - Miami Beach, FL - 2018

NUE Urban Concepts served as the deputy project manager working with the City of Miami Beach on development of its Mobility Fee. The Mobility Fee for the City is unique as it does not include any road capacity projects and instead is focused on walking, bicycling, transit, shared mobility and innovative parking strategies. The Mobility Fee is the first in the U.S. based on the mode share goals established in the City's Transportation Plan. The City seeks to reduce the mode share of vehicle trips to 43% and increase the mode share of transit to 20%, walking to 17%, bicycling to 8% and new technologies to 12%.

Osceola County Mobility Plan & Mobility Fee - Kissimmee, FL - 2016

NUE Urban Concepts served as the deputy project manager for development of a mobility fee for the County and worked with the County to update its Mobility Plan. The mobility fee replaced transportation concurrency within the County. The Mobility Fee featured separate assessment areas and fees for mixed-use development and for transit oriented development. The mobility plan identified future two lane avenues, four lane boulevards and multimodal corridors throughout the County. MetroPlan Orlando was consulted during development of the Mobility Plan and Mobility Fee.

Sarasota County Mobility Plan & Mobility Fee - Sarasota, FL - 2015

NUE Urban Concepts was the project manager for development of a mobility plan and mobility fee for the County and included the Town of Longboat Key and the Cities of Venice and North Port. The mobility plan was based upon future complete street mobility corridors and multimodal corridors. The mobility fee replaced transportation concurrency and road impact fees and included lower rates for urban infill areas and mixed-use development. The Sarasota Manatee MPO was consulted during development of the Mobility Plan and Mobility Fee.

OTHER RELEVANT PROJECT EXPERIENCE

- Celebration Pointe Transit Oriented Development – Land Use & Transportation Planning & Traffic – Ongoing GPC
- Sarasota County Impact Fees, Mobility Fees & Land Use & Transportation Planning – Ongoing GPC
- City of St. Augustine Mobility Plan, Mobility Fee & Parking Management - Ongoing
- City of DeBary Mobility Plan & Mobility Fee – Ongoing
- City of Tallahassee / Leon County Alternative Mobility Funding System Study – Ongoing
- City of Miami Beach Transportation Plan Update & Mobility Fee – 2018
- City of Palm Beach Gardens EAR, Mobility Plan & Mobility Fee – 2018
- City of West Palm Beach Mobility Plan, Mobility Fee & Parking Management – 2018
- City of Palm Coast Transportation Impact Fee Update – 2018
- City of Maitland Mobility Plan & Mobility Fee – 2016
- City of Altamonte Springs Mobility Plan & Mobility Fee – 2016
- Osceola County Mobility Fee – 2016
- City of Dade City Multimodal Transportation Impact Fee - 2016
- Sarasota County EAR, Mobility Plan & Mobility Fee – 2015

REPORTS, ARTICLES & TECHNICAL COMMITTEES

- "Travel in New Urbanist and Traditional Communities: A Case Study of Downtown Orlando" Florida Department of Transportation – September 2000
- "Assessing Level of Service Across Modes"
- Florida Department of Transportation - December 2001
- Florida Department of Transportation Statewide Level of Service (LOS) Taskforce
- Local Government Representative: 2001 to 2011
- "Transportation Concurrency Requirements and Best Practices: Guidelines for Developing and Maintaining an effective Transportation and Concurrency Management System" Florida Department of Community Affairs - September 2006
- "A guide for the creation and evaluation of transportation and concurrency exception areas: case studies for Florida communities," Florida Department of Community Affairs - June 2007
- "Multimodal Arterial LOS Modeling & Testing"
- Florida Department of Transportation - March 2009

- “Florida Mobility Fee Study, Phase 1 Report – Policy Analysis and Methodology”
- Florida Department of Community Affairs - March 2009
- “Evaluation of the Mobility Fee Concept – Final Report”
- Florida Department of Community Affairs November 2009
- “The joint report on the Mobility Fee Methodology Study” Florida Department of Community Affairs & Florida Department of Transportation - December 2009
- “Mobility: Alachua County’s Plan to Effectively Link Land Use & Transportation”
- Florida Planning – Spring 2010
- “A Framework for Transit Oriented Development in Florida” Florida Department of Community Affairs & Florida Department of Transportation - March 2011
- “Proportionate Share Calculation Report”
- Florida Department of Transportation - December 2011
- “Florida Transit Oriented Development Guidebook”
- Florida Department of Transportation - December 2012
- “Woonerfs: Living Streets for All Users”
- American Planning Association – On the Horizon: State of Transportation Planning - 2016
- “Using Mobility Fees to Fund Transit Improvements”
- Florida Department of Transportation – November 2016
- “Personal e-Mobility: Redefining Personal Transport in the 21st Century”
- American Planning Association – On the Horizon: State of Transportation Planning - 2018



Alex Anaya PE, PTOE

Mobility Fee

President / Senior Transportation Engineer (ESRP)

EDUCATION

- Master of Science in Environmental Policy – Bard College (2003)
- Bachelor of Science in Biology – Wittenberg University (1997)

PROFESSIONAL REGISTRATIONS

- Professional Engineer (PE) Florida No. 66983
- Professional Engineer (PE) Kentucky No. 25407
- Professional Traffic Operations Engineer (PTOE)

YEARS OF EXPERIENCE

- 22 years

PROFILE

Mr. Anaya serves as President and Senior Transportation Engineer for ESRP CORPORATION. He has significant experience in corridor and sub-area planning, traffic analysis and travel-demand modeling as well as traffic design, modern roundabout design, roadway design, safety and operations. Mr. Anaya has managed transportation projects of varied scopes and sizes including PD&E studies, corridor studies and multimodal feasibility analyses. His experience also includes transportation planning and traffic engineering studies in connection with developments of regional impact and large-area comprehensive-plan amendments as well as special transportation studies, and benefit/cost analyses.

RELEVANT PROJECT EXPERIENCE

Gamble Creek Village - Manatee County, Florida

Gamble Creek Village is a proposed 6,000-acre community in eastern Manatee County. Mr. Anaya has been responsible for the transportation studies in connection with this project. His work includes travel-demand modeling and traffic analysis of mid-term and long-term scenarios to support a Comprehensive Plan Amendment. He has analyzed the interactions between the project's traffic-analysis zones (TAZs) and has estimated community capture rates taking into account the proposed land uses and their location as well as a number of multi-modal transportation elements and initiatives intended to promote non-motorized modes of transportation and transit use.

The Villages of Lakewood Ranch South DRI - SMR - Schroeder-Manatee Ranch, Inc. - Manatee and Sarasota Counties, Florida

This project consisted of a comprehensive traffic analysis for a large-scale development in Sarasota County, Florida. The study area included a significant portion of Manatee County. Proposed land uses included more than 2,100 residential units, 235,000 square feet of retail space and 57,000 square feet of office space in addition to schools and parks. As project manager and senior transportation engineer, Mr. Anaya forecasted future traffic volumes based on the FSUTMS travel-demand model and carried out intersection and arterial capacity analyses taking into account existing signal timing plans. He also determined the optimized peak-hour signal timing for unsignalized intersections that needed to be signalized. Additionally, Mr. Anaya estimated construction cost, calculated the project's proportionate share and determined the external-trip-thresholds in connection with the improvements required to meet Sarasota County, Manatee County and FDOT standards.

Multi-Modal Justification Study - Alt. US 19 (SR 595) from north of Whisper Lake Rd. to Harry St. - FDOT District 7 (FPN: 403725-1-32-01) - Pinellas County, Florida

Mr. Anaya participated in this project as a senior transportation engineer and was in charge of a Multi-Modal Justification Study for the section of Alt. US 19 (SR 595) beginning just north of Whisper Lake Road (MP 7.267) and ending at Harry Street (MP 10.645) in Pinellas County, Florida. The purpose of this study was to evaluate the need for providing and/or improving bicycle, pedestrian, and transit facilities along the corridor. Mr. Anaya participated in all project tasks including field review, data search, data analysis, development of alternatives, cost estimation, recommendations and final report preparation.

**Lakewood Ranch Corporate Park DRI - SMR
- Schroeder-Manatee Ranch, Inc. -
Several Counties, Florida**

Responsible for all tasks in connection with traffic concurrency/NOPC analyses and corresponding reports in connection with a development of regional impact (DRI) that included more than 2.5 million square feet of industrial/office/retail space. Analyzed existing and future roadway conditions along main collectors, arterials and freeways using the FSUTMS travel-demand model and taking into account existing signal-timing plans. Proposed the optimized peak-hour signal timing for unsignalized intersections that needed to be signalized. Determined required transportation improvements and estimated trip thresholds that would trigger them. Estimated the project proportionate share in connection with the required improvements.

**Comprehensive Plan Amendments - Schroeder-Manatee Ranch (NW and NE Quadrants) - SMR
- Schroeder-Manatee Ranch, Inc. - Manatee County, Florida**

The ultimate goal of this project was to amend the Manatee County Comprehensive Plan changing the Future Land Use (FLU) of more than 7,000 acres in eastern Manatee County, Florida. A thorough analysis of the potential impacts on the regional transportation network caused by two proposed comprehensive plan amendments was carried out by Mr. Anaya, who participated in this project as a Senior Transportation Engineer. Mr. Anaya was responsible for all tasks including assignment of land-use types and land-use sizes to FSUTMS traffic analysis zones (TAZ's) based on the Manatee County Land Development Code and the Manatee County Comprehensive Plan as well as existing and proposed FLU's. He also used FSUTMS model output and various GIS tools in order to forecast travel demand, assess impacts on the thoroughfare network and determine future roadway capacity requirements based on Manatee County and FDOT standards.

Feasibility Analysis for Conversion of One-Way Streets Florida Avenue/Tampa Street/Highland Avenue (SR 685/US Business 41) - FDOT District 7 (General Planning Consultant Contract - FPN 25919-1-12-16 - Contract #: C-8K 79) - City of Tampa, Florida

As a senior transportation/traffic engineer, Mr. Anaya performed a comprehensive analysis of a 3.4-mile one-way street pair in the City of Tampa FL. The analysis involved the creation of a micro-simulation model that was built using the Synchro software and TBRPM output data. Traffic control delay was analyzed under existing and several proposed conditions (alternatives) taking into account factors such as signal timing and signal coordination. Intersection data was exported to HCS for further analysis. The main objective of this analysis was to determine the viability and convenience of converting the one-way street pair to two-way streets.

The Proscenium - Proportionate Share Agreement - Lion's Gate Development, Inc. - City of Sarasota, Florida

The Proscenium was a large-scale mixed-use proposed development located within a Transportation Concurrency Exemption Area (TCEA) in the City of Sarasota, Florida. Due to the size of this project and its potential impact on the regional roadway network, various analyses and prolonged negotiations were necessary to obtain approval for construction. As a transportation/traffic engineer, Mr. Anaya assisted the developer team throughout the approval process and during the negotiation of a proportionate share agreement with the City of Sarasota (the first agreement of this nature in this jurisdiction) without which the project would have not been approved.

Northwest Sector DRI - SMR - Schroeder-Manatee Ranch, Inc. - Manatee County, Florida

This development of regional impact (DRI), located in north Manatee County (Florida), included 3,000 residential units and more than 300,000 square feet of commercial/retail/office space. As project manager and senior transportation engineer, Mr. Anaya was responsible for the preparation of a comprehensive concurrency study in connection with this project. He forecasted future traffic conditions on the regional roadway network, using the FSUTMS travel-demand model, and determined required geometry/capacity improvements along three important arterials (with approximately 30 signalized intersections) based on capacity analyses and taking into account the timing and operation of existing signals.

Additionally, Mr. Anaya calculated the trip thresholds that would trigger those improvements and estimated the corresponding project's proportionate share.

US 41 from 10th to 14th Street (PD&E) - Concept Design of Two 2-lane Roundabouts - FDOT District 1 (FPN: 428383 1 22 01) - City of Sarasota, Florida

As a senior transportation engineer and Project Manager, Mr. Anaya carried out this project for ESRP Corporation (ESRP was a subcontractor for one of the team firms) and led the design (PD&E Scope) of two 2-lane roundabouts and surrounding bicyclist/pedestrian facilities. This design involved significant complexity due to right-of-way limitations and the required approach configuration to support estimated traffic volumes. Future traffic conditions on US 41 were analyzed. Several design iterations were needed as well as extensive analysis of design-vehicle paths to make sure that the new geometry at both intersections would provide enough space for large-vehicle maneuvers.

K Bar Ranch Multi-Phase/Multi-Year Travel Forecast and Traffic Analysis - Icon Consultant Group, Inc. - City of Tampa, Florida

K Bar Ranch is a large-scale, mixed-use, multi-phase regional development located in the north portion of the City of Tampa, Florida. ESRP conducted a comprehensive traffic analysis for this development. Extensive use of the Tampa Bay Regional Planning Model (TBRPM) was required to forecast traffic conditions under

seven proposed phases and several scenarios with and without connections to Pasco County. Most scenarios were analyzed under morning and afternoon peak-traffic conditions. Roadway and traffic-operations improvements, to maintain acceptable levels of service, were identified and recommendations were provided for each phase of the project.

Main Street / Orange Avenue - City of Sarasota (120104) - City of Sarasota, Florida

Mr. Anaya was responsible for roadway design and related bid documents in connection with this project. The project includes modifications on Orange Avenue and Main Street as well as a modern roundabout in Downtown Sarasota. Mr. Anaya was the Project Manager (for ESRP) and lead design engineer in charge of roadway design, signing-and-pavement markings (S&PM) and maintenance of traffic (MOT). The project included new curb and gutter sections as well as minor regrading, reconstruction of sidewalks, additional on-street parking, and various types of pedestrian ramps and barriers. The design criteria used for this project is based on FDOT standards and the City of Sarasota EDCM.

Tampa Bay Regional Goods Movement Study - Freight Corridor Screenings - FDOT District 7 - Several Counties, Florida

Responsible for all activities in connection with the screening of approximately 15 corridors (principal arterials) located within several counties in southwest Florida. This project was focused on potential issues as it relates to freight movement. As a senior transportation engineer, Mr. Anaya carried out most tasks including field observation, data search, crash data analysis as well as evaluation of existing and/or potential problems that could affect freight movement.

Boy Scout Road and Race Track Road Intersection Modification - Hillsborough County (CIP 69363) - Hillsborough County, Florida

As a senior transportation engineer, Mr. Anaya worked on the design of a roundabout for the Boy Scout Road and Race Track Road three-legged intersection. Provided design assistance in connection with the geometry of the roundabout approaches as well as the entry and exit approach speeds. Calculated the design speeds of the fastest movements and made corrections to achieve speed consistency.

The Aviary at Rutland Ranch - Manatee County, Florida

Developed a traffic concurrency study for this major residential development in north Manatee County. Produced recommendations for traffic impact mitigation and estimated timing for future improvements.

Multi-Modal Justification Study - US 301 (SR 43) from SR 676 (Causeway Blvd) to SR 574 (MLK Jr. Blvd) - FDOT District 7 (FPN: 416842-1-32-01) - Hillsborough County, Florida

As a senior transportation engineer, Mr. Anaya was responsible

for all activities in connection with a Multi-Modal Justification Study for US 301 between Causeway Blvd. and MLK Jr. Blvd. in Hillsborough County, Florida. The purpose of the study was to evaluate the adequacy and feasibility of providing bicycle and/or pedestrian facilities along the corridor. Mr. Anaya participated in all project tasks including field review, data search, data analysis, development of alternatives, cost estimation, recommendations and final report preparation.

Citizens Bank & Trust Alternative Impact Fee Study - Citizens Bank & Trust - Polk County, Florida

This project was in connection with three new Citizens Bank & Trust branches located in Polk County (Florida). The main objective was to develop a transportation impact fee for drive-through banks based on local data. The transportation impact-fee rates used by Polk County, at the time of this project, were developed based on ITE data that was collected in other states. As a result, these data did not accurately represent the travel- demand/trip-length conditions in Southwest Florida. Mr. Anaya served as project manager and was responsible for all tasks in connection with this project including traffic data collection activities (traffic counts / origin-destination surveys), data analysis, trip-rate estimation, average trip length determination, alternative impact fee calculations and final recommendations.

Clifton Pedestrian Facilities Study - City of Grand Junction - City of Grand Junction, Colorado

Performed a comprehensive inventory and assessment of existing pedestrian facilities throughout the Clifton CDP in western Colorado. Determined new pedestrian facilities required to provide connectivity, improve safety and comply with ADA standards. Used GIS customized applications to store and display data for analysis purposes. Recommended improvements to the existing pedestrian infrastructure and proposed roundabouts to reduce crash rates at certain locations. Provided design details and GIS maps to support analysis and recommendations.

Buckhead Trails - Medallion Home - Manatee County, Florida

Responsible for all tasks in connection with the traffic concurrency study for this major mixed-use development in north Manatee County. Produced recommendations for traffic impact mitigation as well as proportionate fair share estimates in connection with recommended transportation improvements.

Impact Fee Studies - Various Clients, Florida - Several Counties, Florida

Prepared alternative impact-fee studies for diverse types of projects in several Southwest Florida cities and counties. Estimated variables such as trip-generation and trip-length based on traffic and survey data collected at multiple locations. Projects include:

- Holiday Inn Express Hotel and Suites
- US Highway 27, approximately 0.3 miles north of Chalet Suzanne Road Polk County, Florida
- Hampton Inn & Suites Hotel

- US Highway 27, approximately 0.8 miles south of Chalet Suzanne Road Polk County, Florida
- Bowling Alley/Entertainment Center
- East of Lakewood Ranch Boulevard and just north of Center Ice Parkway Manatee County, Florida
- Trustco Bank
- US 27 near Deer Creek Boulevard Polk County, Florida.
- Citizens Bank & Trust:
 - » 1985 E. Edgewood Dr., Lakeland, FL
 - » 1450 N. Broadway, Bartow, FL
 - » Corner of South Florida Ave. (SR 37) and Brannen Road
 - » Lakeland, FL - Outside the city limits.

Arbor Park Comprehensive Plan Amendment - Medallion Home - Manatee County, Florida

The central part of this project was a detailed analysis of impacts on the regional transportation network in connection with proposed land uses that required an amendment of the Manatee County Comprehensive Plan. Mr. Anaya served as project manager and senior transportation engineer for this project and was responsible for all traffic analyses in connection with this large-scale mixed-use development in Manatee County. He estimated future travel demand, recommended improvements for project impact mitigation and calculated the corresponding project's proportionate fair share.



Jerry Murphy JD, AICP, CFM

Affordable Housing & Land Use Plans/Regulations

Principal (Murphy Planning)

EDUCATION

- University of Florida Colleges of Law and Architecture, Gainesville, FL Concurrent Degree Program, Juris Doctor and Master of Arts in Urban and Regional Planning with Honors, May 1999
- University of Florida College of Architecture, Gainesville, FL Bachelor of Arts in Landscape Architecture, August 1994

CERTIFICATION

- American Institute of Certified Planners
- Certified Floodplain Manager
- National Incident Management System (NIMS) Incident Command Structure (ICS) certifications: 100, 200, 300, 400, 700, 800, 440
- Florida Association of Code Enforcement (FACE) Levels I and III

PROFESSIONAL MEMBERSHIPS

- American Planning Association
- American Planning Association FL
- Florida Planning and Zoning Association
- Growth & Infrastructure Consortium
- American Institute of Certified Planners (AICP)
- Florida Trust for Historic Preservation
- International City/County Management Association
- Friends of Fakahatchee
- Association of State Floodplain Managers
- Florida Floodplain Managers Association

YEARS OF EXPERIENCE

- 23 years

PROFILE

Murphy Planning is a sole proprietary, comprehensive planning practice. Murphy Planning collaborates with local governments, academia, and other private practitioners on large-scale and major planning projects. These planning projects cross a broad range of endeavors to improve community resilience and sustainability. The overarching goal is to assist local governments in maximizing the return on investment for their land use planning efforts.

RELEVANT EXPERIENCE

University of Florida, College of Design, Construction, and Planning: Resilient Communities Initiative

Project Coordinator: provide ongoing assistance to partner communities confronted with the challenge of anticipating and responding to threats and opportunities to establish community resiliency, addressing a wide range of critical issues, including but not limited to land use and environment, transportation, community and economic development, community design, infrastructure needs, and natural hazard planning and mitigation

Murphy Planning, Fort Myers, Sarasota, Gainesville, FL

Principal: provide to clients professional comprehensive planning consultation services, including strategic programming, planning, and development of capital improvement and development plans, land use planning and zoning, legislative drafting, contract negotiation, litigation assistance (Court, code compliance, Bert

J. Harris Act/Florida Land Use and Environmental Dispute Resolution Act claims, etc.), expert witness services, community consensus building, disaster preparedness planning, disaster recovery and mitigation assistance, development application and processing. Representative Clients: Town of Fort Myers Beach, FL., various projects; A Living Vision of Alva (ALVA), Inc., Alva, FL., community planning, land development regulations, and form-based regulating plans for village centers; Lee County Board of County Commissioners/Clarion Associates, New Horizon 2035 (2011 Evaluation and Appraisal Report (EAR)); City of Cape Coral/Florida Gulf Coast University, community outreach for 2012 EAR; City of Fort Myers/Spikowski Planning Associates, Post-Disaster Redevelopment Planning Review and Recommendations

Town of Fort Myers Beach, Fort Myers Beach, FL

Director, Department of Community Development: managed department responsible for long-range planning, zoning, floodplain development and management, environmental compliance, building permitting, inspections, and code compliance, licensing functions, and historic preservation; coordinated impact fee adoptions and updates prepared recommendations to improve current growth management and land development procedures, programs, and regulations, to balance new development and extensive redevelopment with quality of life and citizen's community vision; improved the efficiency and effectiveness of the administrative functions of the department; conducted studies, surveys, and workshops to inform legislative recommendations and build community consensus; organized, assigned, and trained personnel; evaluated work performances; coordinated budget preparation with other departments including 5-year schedule of capital improvement; maintained monetary controls and accountability for appropriations; advised Town Council on state and federal changes affecting community development; served as liaison to Lee County Emergency Operations Center

Lee County Department of Community Development, Fort Myers, FL Planner

Prepared and presented reports and recommendations on zoning applications in public hearings before appointed and elected decision-makers; coordinated impact fee adoptions and updates; managed and coordinated with County and municipal attorneys special projects including research and preparation of reports on complex zoning issues, wireless communications infrastructure; prepared and presented proposed land development regulation amendments to committees of the Board; supervised legal and map review of all applications for zoning changes; supervised revision and correction of official maps in Geographic Information System (GIS); reviewed petitions to vacate rights-of-ways, development order extensions; drafted zoning verification letters

Apgar & Pelham, Tallahassee, FL

Summer Associate: researched legal issues relevant to land use, comprehensive planning, growth management, Florida's Constitutional Revision Commission proposals, vested rights, equitable estoppel, and professional responsibility; drafted legal briefs; prepared memoranda and educational materials

Professor Julian Juergensmeyer, UF Colleges of Law and Architecture, Research Assistant

Researched land use law issues and drafted revisions to hornbook, LAND USE PLANNING AND CONTROL LAW, and for loose-leaf, FLORIDA LAND USE AND GROWTH MANAGEMENT LAW

Center for Governmental Responsibility, UF College of Law Research Assistant

Researched and prepared reports on issues including proposed Florida Constitution revisions, sustainable development, local government law, hazard mitigation and post-disaster redevelopment planning; drafted annotated interlocal agreement for Flagler County, FL

Earl Starnes, Ph. D. and Earnest Bartley, Ph. D., Emeritus Professors

UF Department of Urban/Regional Planning, Gainesville and Cedar Keys, FL Research Assistant: researched issues and assisted in preparation of report on implementing statewide greenway system

Financial Report

As evidenced by Raftelis' 25 years of successfully providing consulting services to hundreds of public agencies across the country, Raftelis is financially stable and has the resources to provide the requested services to the City in a satisfactory manner. We have provided our financial statement as further evidence of our financial stability. Raftelis is a relatively small, privately-held firm and, as with most privately-held firms, our financial statements are deemed confidential and proprietary and are marked as such.

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Litigation

Raftelis is not currently involved in or has been involved in any litigation over the past five years.

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City of Hollywood, Florida
RFQ-4604-19-PB

Issue Date: January 27, 2019

ACKNOWLEDGMENT AND SIGNATURE PAGE

This form must be completed and submitted by the date and the time of bid opening.

Legal Company Name (include d/b/a if applicable): ^{Raftelis Financial} Consultants, Inc. Federal Tax Identification Number: 20-1054069

If Corporation - Date Incorporated/Organized: Incorporated April 23, 2004 / Founded May 10, 1993

State Incorporated/Organized: North Carolina

Company Operating Address: 950 S. Winter Park Dr., Suite 240

City Casselberry State FL Zip Code 32707

Remittance Address (if different from ordering address): 227 W. Trade Street, Suite 1400

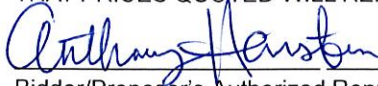
City Charlotte State NC Zip Code 28202

Company Contact Person: Anthony D. Hairston Email Address: ahairston@raftelis.com

Phone Number (include area code): 407.960.1806 Fax Number (include area code): 704.373.1113

Company's Internet Web Address: https://www.raftelis.com/

IT IS HEREBY CERTIFIED AND AFFIRMED THAT THE BIDDER/PROPOSER CERTIFIES ACCEPTANCE OF THE TERMS, CONDITIONS, SPECIFICATIONS, ATTACHMENTS AND ANY ADDENDA. THE BIDDER/PROPOSER SHALL ACCEPT ANY AWARDS MADE AS A RESULT OF THIS SOLICITATION. BIDDER/PROPOSER FURTHER AGREES THAT PRICES QUOTED WILL REMAIN FIXED FOR THE PERIOD OF TIME STATED IN THE SOLICITATION.



Bidder/Proposer's Authorized Representative's Signature: _____

1/18/2019

Date

Type or Print Name: Anthony D. Hairston, Vice President

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF BIDDER/PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE BID/PROPOSAL NON-RESPONSIVE. THE CITY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY BID/PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE BIDDER/PROPOSER TO THE TERMS OF ITS OFFER.

ANY EXCEPTION, CHANGES OR ALTERATIONS TO THE GENERAL TERMS AND CONDITIONS, HOLD HARMLESS/INDEMNITY DOCUMENT OR OTHER REQUIRED FORMS MAY RESULT IN THE BID/PROPOSAL BE DEEMED NON-RESPONSIVE AND DISQUALIFIED FROM THE AWARD PROCESS.

Issue Date: January 27, 2019

Worker's Compensation \$100,000/500,000/100,000 for coverage

D. **Professional Liability** recognizing that the work governed by this contract involves the furnishing of advice or services of a professional nature, the Contractor shall purchase and maintain, throughout the life of the contract, Professional Liability Insurance which will respond to damages resulting from any claim arising out of the performance of professional services or any error or omission of the Contractor arising out of the work governed by this contract.

Professional Liability \$1,000,000 Each Claim / \$2,000,000 Aggregate

Please Note: The Certificate shall contain a provision that coverage afforded under the policy will not be cancelled until at least 30 days prior written notice has been given to the City. Certificates of insurance, reflecting evidence of the required insurance, shall be provided to the City. Certificates of insurance, reflecting evidence of the required insurance, shall be provided to the City. In the event the Certificate of Insurance provided indicates that the insurance shall terminate and lapse during the period of this Agreement, the vendor shall furnish, at least 30 days prior to the expiration of the date of such insurance, a renewed Certificate of Insurance as proof that equal and like coverage for the balance of the period of the Agreement or extension is in effect.

HOLD HARMLESS AND INDEMNITY CLAUSE

(Company Name and Authorized Representative's Name)

Raftelis Financial Consultants, Inc., the contractor, shall indemnify, defend and hold harmless the City of Hollywood, its elected and appointed officials, employees and agents for any and all suits, actions, legal or administrative proceedings, claims, damage, liabilities, interest, attorney's fees, costs of any kind whether arising prior to the start of activities or following the completion or acceptance and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part by reason of any act, error or omission, fault or negligence whether active or passive by the contractor, or anyone acting under its direction, control, or on its behalf in connection with or incident to its performance of the contract.


SIGNATURE

Anthony D. Hairston
PRINTED NAME

Raftelis Financial Consultants, Inc.
COMPANY OF NAME

1/18/2019
DATE

Failure to sign or changes to this page shall render your bid non-responsive.

Issue Date: January 27, 2019

NON-COLLUSION AFFIDAVIT

STATE OF: North Carolina)
)
COUNTY OF: Union)

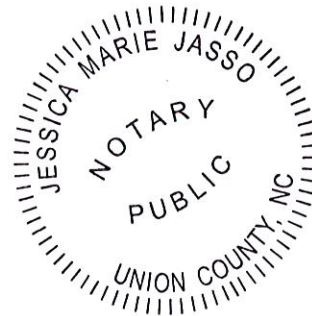
being first duly sworn, deposes and says that:

- (1) He/she is Elaine Conti of Raftelis Financial Consultants, Inc., the Bidder that has submitted the attached Bid.
- (2) He/she has been fully informed regarding the preparation and contents of the attached Bid and of all pertinent circumstances regarding such Bid;
- (3) Such Bid is genuine and is not a collusion or sham Bid;
- (4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with the contractor for which the attached Bid has been submitted or to refrain from bidding in connection with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices, profit or cost element of the Bid price or the Bid price of any other Bidder, or to secure an advantage against the City of Hollywood or any person interested in the proposed Contract; and
- (5) The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

(SIGNED) Elaine Conti Vice President
Title:

Failure to sign or changes to this page shall render your bid non-responsive.

Jessica Marie Jasso
My Commission expires 12-1-19



SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS

1. This form statement is submitted to the City of Hollywood
By Elaine Conti, Vice President for Raftelis Financial Consultants, Inc.
(Print individual's name and title) (Print name of entity submitting sworn statement)
Whose business address is 950 S. Winter Park Dr., Suite 240, Casselberry, FL 32707
and if applicable its Federal Employer Identification Number (FEIN) is 20-1054069 If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.

2. I understand that "public entity crime," as defined in paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid, proposal, reply, or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misinterpretation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in an federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that "Affiliate," as defined in paragraph 287.133(1)(a), Florida Statutes, means:
1. A predecessor or successor of a person convicted of a public entity crime, or
2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5 I understand that "person," as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or any entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

Neither the entity submitting sworn statement, nor any of its officers, director, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime, but the Final Order entered by the Hearing Officer in a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings, determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (attach a copy of the Final Order).

Issue Date: January 27, 2019

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THAT PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017 FLORIDA STATUTES FOR A CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Elaine Conti
(Signature)

Sworn to and subscribed before me this 19th day of February, 2019.

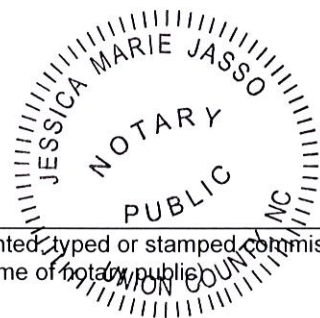
Personally known Elaine Conti

Or produced identification _____

Notary Public - State of North Carolina

Jessica Marie Jasso

My commission expires: 12-1-19



(Printed, typed or stamped, commissioned name of notary public)

Failure to sign or changes to this page shall render your bid non-responsive.

Issue Date: January 27, 2019

**CERTIFICATIONS REGARDING DEBARMENT, SUSPENSION AND OTHER
RESPONSIBILITY MATTERS**

The applicant certifies that it and its principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, sentenced to a denial of Federal benefits by a State or Federal court, or voluntarily excluded from covered transactions by any Federal department or agency;
- (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default.

Applicant Name and Address:

Raftelis Financial Consultants, Inc.

950 S. Winter Park Dr., Suite 240

Casselberry, FL 32707

Application Number and/or Project Name:

RFQ-4604-19-PB

Applicant IRS/Vendor Number: 20-1054069

Type/Print Name and Title of Authorized Representative:

Anthony D. Hairston

Signature:  Date: 1/18/2019

Failure to sign or changes to this page shall render your bid non-responsive.

DRUG-FREE WORKPLACE PROGRAM

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employee that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program (if such is available in the employee's community) by, any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of these requirements.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



VENDOR'S SIGNATURE

Anthony D. Hairston

PRINTED NAME

Raftelis Financial Consultants, Inc.

NAME OF COMPANY

Issue Date: January 27, 2019

REFERENCE QUESTIONNAIRE

It is the responsibility of the contractor/vendor to provide a minimum of three similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

Giving reference for: Raftelis

Firm giving Reference: City of Sanford, FL

Address: 300 N. Park Avenue P.O. Box 1788 Sanford FL 32772-1788

Phone: 407.688.5020

Fax: 407-688-5021

Email: Cynthia.Lindsay@Sanfordfl.gov

1. Q: What was the dollar value of the contract?
A: Police and Fire Impact Fee Update (with change orders)
\$36,186
2. Have there been any change orders, and if so, how many?
A: One change order for \$13,870
3. Q: Did they perform on a timely basis as required by the agreement?
A: Yes
4. Q: Was the project manager easy to get in contact with?
A: Yes
5. Q: Would you use them again?
A: Yes
6. Q: Overall, what would you rate their performance? (Scale from 1-5)
A: 5 Excellent 4 Good 3 Fair 2 Poor 1 Unacceptable
7. Q: Is there anything else we should know, that we have not asked?
A:

The undersigned does hereby certify that the foregoing and subsequent statements are true and correct and are made independently, free from vendor interference/collusion.

Name: Cynthia Lindsay
Title: Dir. of Finance

Signature: Cynthia Lindsay Date: 2/18/19



GREATER ORLANDO
AVIATION AUTHORITY



Florida Unified Certification Program

Disadvantaged Business Enterprise (DBE) Certificate of Eligibility

ESRP CORPORATION

MEETS THE REQUIREMENTS OF 49 CFR, PART 26

APPROVED NAICS CODES:

541330, 541340, 541690, 541511, 541519, and 541370

Issued: May 23, 2016

VICTORIA V. SMITH, DBE Certification Manager - Florida Department of Transportation



JACKSONVILLE
TRANSPORTATION
AUTHORITY

