

Proposal

Development Impact Fee Program Evaluation

The Economics of Land Use



Prepared for:
City of Paramount

Prepared by:
Economic & Planning Systems, Inc.
In partnership with Fehr & Peers and Bartle Wells Associates

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June 3, 2024

EPS #244011

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The Economics of Land Use



June 3, 2024

Sol Bejarano, Management Analyst
City of Paramount
16400 Colorado Ave.
Paramount, CA 90723

Subject: Proposal to Conduct a Development Impact Fee Program
Evaluation; EPS #244011

Dear Ms. Bejarano:

On behalf of Economic & Planning Systems, Inc. (EPS), Fehr & Peers, and Bartle Wells Associates ("EPS Team"), I am pleased to submit this proposal to conduct an evaluation and update to the City of Paramount's development impact fee program. We understand that City would like to update its six existing development impact fees—General Plan, Park Development, Public Art, Water Capital, Sewer Reconstruction, and Storm Drainage-- and also explore the adoption of three additional fee categories, including Transportation, Public Safety, and an Affordable Housing Commercial Linkage Fee.

Founded in 1983, EPS is a land use economic consulting firm with offices in Los Angeles, Oakland, Sacramento, and Denver. The firm has completed hundreds of development impact fee nexus studies for jurisdictions throughout California, and is deeply familiar with the regulatory environment governing the development and implementation of impact fee programs. Additionally, our broader practice in public finance allows us to ensure that development impact fees are effectively integrated with other financing mechanisms and resources to best serve cities' needs. We also apply our broad understanding of real estate economics and land use planning to ensure fee programs effectively balance the need for quality public facilities with the feasibility of new development and other critical policy objectives.

For this effort, EPS has partnered with two frequent collaborators, Fehr & Peers and Bartle Wells Associates, to conduct analysis for the Transportation, Water Capital, Sewer Reconstruction, and Storm Drainage. The two firms bring expertise in the specialized methodologies needed for these particular fee categories and have successfully developed fee programs for jurisdictions across the State.

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The enclosed proposal includes our proposed scope, budget, and schedule to complete the requested study, as well as additional information on our experience and qualifications. we would be happy to discuss the proposal and consider revisions that may be needed to better meet the City's needs. The proposal as submitted will be remain valid for up to 120 days of the date of this letter. If you have any questions or comments related to this proposal, please do not hesitate to contact me – my contact information is included below.

We are very excited about the opportunity to work with the City on this important project, and we look forward to hearing from you soon.

Sincerely,

ECONOMIC & PLANNING SYSTEMS, INC.

A handwritten signature in dark ink, appearing to read 'Julie Cooper', with a stylized flourish at the end.

Julie Cooper
Principal
800 Wilshire Blvd., Suite 410
Los Angeles, CA 90017
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1. Executive Summary

The City of Paramount is seeking to review, update, and expand their existing development impact fee programs to help fund a range of public facility improvements that are important to the City's future and quality of life. EPS understands that the economic vitality of the City is linked to critical investment in its urban infrastructure system. The fee program will supplement other local, State, and Federal funding programs by having new development pay a proportional share of the costs of needed facilities. If appropriately updated and implemented, the City's fee program can be an important stimulus for economic development, providing certainty to developers about the rules and financial obligations they will face and ensuring adequate infrastructure will be available to support growth and enhance competitiveness.

The EPS Team's approach to developing a comprehensive fee program is based on understanding the local context and the technical and legal issues inherent in an impact fee study. This approach relies on a collaborative, iterative, and informed decision-making process. The EPS Team combines sound technical analysis, grounded in legally defensible nexus arguments, with ongoing policy direction from the various stakeholders, including public agency staff and elected officials, the local public, and the development community.

Our team has found that the most successful impact fee studies are those that inform key stakeholders throughout the study process and seek feedback on findings. Project milestones and checkpoints will be set where stakeholders are provided the analytic findings and are asked to respond with any questions or comments. Based on this feedback, City staff and the EPS Team will determine whether additional further research or technical modifications should be made.

While a participatory process can help to achieve politically and economically acceptable fees, it is also important to maintain clear objectives to guide the study process. The ultimate project objective includes the establishment of a revised set of development impact fees that strike a mutually enforcing balance between infrastructure and public facilities and new development and investment in the City.

Project steps include developing a schedule of maximum fees, by land use category, which are justifiable based on AB 1600, the Mitigation Fee Act (California Government Code sections 66000 et seq.) and subsequent related legislation, including AB 602. The Mitigation Fee Act sets forth the procedural requirements for establishing and collecting development impact fees and requires that a reasonable relationship, or nexus, must exist between a governmental exaction and the purpose of the condition. The maximum allowable fee levels then act as a starting point for review and discussion concerning fee levels and program implementation, recognizing there are several economic and policy considerations that inform fee program decisions beyond the specifics of the technical work.

The EPS Team considers the following objectives to be the most important for an impact fee study:

- **The fees must be legally defensible.** The fees should be developed and implemented in a fashion that unambiguously complies with applicable State law. The fees should be based on explicit growth and cost assumptions and sound nexus arguments that ensure the types of improvements and facilities and the costs of the improvements and facilities are directly attributable to benefiting land uses.
- **The fees must be financially effective.** The fees developed should provide sufficient means for successfully funding the new improvements and required capital facilities targeted by the program. Given that fee revenues are likely to represent only one, albeit important, funding source for infrastructure and public facilities, the development impact fee program must be effectively integrated with other programs and resources to ensure stakeholders (and developers who pay the fees) that the facilities will ultimately be built.
- **The fees must be politically and economically viable.** The fees developed in this process should reflect input from key stakeholders in the community to ensure that they receive broad support. Although the technical steps provide the basis for completing the impact fee study, it is recognized that ultimate approval will require compromise and policy choices. To this end, it will be important for both the consultant team and City staff to provide clear information and updates to City Council and other stakeholders throughout the process. In addition, it will be important to understand and monitor the economic implications of the fee program to ensure that financial burdens on development are reasonable and do not hinder growth.

2. Scope of Work

The EPS Team has established the following proposed work program for updating and expanding Paramount's Development Impact Fee program, informed by the City's unique circumstances and objectives, as well as our experience on other similar projects. The EPS Team looks forward to working with the City to calibrate the proposed work program and associated budget to best suit the City's needs, recognizing that some analytical elements described below may not be required at the level of detail or effort currently offered.

Task 1: Project Initiation and Document Review

The EPS Team will participate in a Project Initiation meeting with the City Team to refine the scope, schedule, and deliverables, as needed; identify key resources and data; establish the study outreach and communication protocol; and identify key technical and policy issues/challenges and to resolve how they will be addressed. This meeting will also address the following topics:

- Potential new fee categories
- Anticipated capital improvement needs and costs relevant to the fee categories
- Fee calculation approaches and any potential modifications from the existing fee structure
- City growth projections
- Land use categories included in the fee program and any potential modifications from the existing categories, including the addition of allowable fees for ADUs
- Preliminary discussion of fee modifications strategies such as fee credits, land use exemptions, and zones of benefit (explored further in **Task 8**).

Prior to the Project Initiation meeting, the EPS Team will request and review relevant documents and data from the City, including the existing Development Impact Fee Program structure and schedule; previous impact fee studies; the City's General Plan, Specific Plans, and Master Plans; the City's CIP; and any other relevant document as necessary. The EPS Team will discuss issues and questions related to these documents with the City Team and identify additional information needs, if any.

Task 2: Data Collection and Development of Project List

Subtask 2.1: Land Use Projections

The EPS Team will review planning documents and work with City staff to establish appropriate land use assumptions and growth projections. Land use projections will be important for allocating the public facility demands of new development on a pro rata basis relative to demand generated by existing uses. EPS will focus on the land use categories discussed in the Project Initiation meeting, and based on the Team's review

and extensive experience with appropriate AB 1600 nexus methodologies, will identify any issues and potential items for further discussion with the City Team.

Subtask 2.2: Project List Development

The EPS Team will work with relevant City departments to compile a list of the City's infrastructure and public facility needs and costs. The list will be informed by the departments' long-term capital goals and priorities, service standards, and other factors relevant to the fee program.

As part of this task, the EPS Team will also work with the City to collect information regarding available impact fee fund balances available to offset infrastructure needs, as well as any outstanding credit and reimbursement obligations that the updated fee program should recognize as an outstanding funding need.

The EPS Team assumes that City departments will provide cost estimates associated with the capital improvement needs to be funded in part through the Development Impact Fee program. In the event that the City cannot provide such cost estimates, the EPS Team may engage additional subconsultants to provide these estimates, subject to an additional budget request.

Task 3: Nexus Analysis and Impact Fee Calculation

The EPS Team will prepare the nexus-based cost allocation necessary to develop a preliminary fee schedule for the City's existing fee categories—General Plan, Park Development, Public Art, Water Capital, Sewer Reconstruction, and Storm Drainage—as well as the three new fee categories requested by the City—Transportation, Public Safety, and an Affordable Housing Commercial Linkage Fee. The methodology for calculating the public facility-related development impact fee categories requested for this study is detailed in the following subtasks, while the methodology for calculating the affordable housing commercial linkage fee is detailed in Task 4.

Subtask 3.1: General Plan, Public Art, Park Development, and Public Safety Fees

To calculate updated General Plan, Public Art, and Park Development fees, as well as the potential new Public Safety facility fee, EPS will prepare a cost allocation model to appropriately assign costs to new development. Specifically, EPS will review each capital project to determine whether the entire cost or a reasonable portion thereof can be fairly allocated to new growth. The costs for projects that clearly serve both existing and new development will be allocated based on the proportion of the demand generated, or other appropriate nexus-based approach. EPS will ensure that facility needs and costs associated with existing deficiencies in service levels are identified as such and are excluded from the nexus analysis.

EPS will then allocate the development impact fee improvement program costs to the land use categories, using industry standard methods to determine the benefit derived by each land use from each fee category. The fee for each land use will be derived by dividing the relative capital facility costs by the projected development in that land use

category. Based upon the cost allocation and with incorporation of the appropriate administrative cost allowance, EPS will prepare a preliminary fee schedule with the total costs attributable to the projected development of each land use type.

Subtask 3.2: Transportation Fee

Fehr & Peers will use the SCAG Activity-Based Model (ABM) base year and 2050 traffic models to determine the extent to which roadways/intersections included in the fee program are used by existing City land uses, future City land uses, and non-City land uses; the number of dwelling unit equivalents (DUEs) anticipated between base year and 2050; and the square feet of commercial developments anticipated between base year and 2050. Fehr & Peers will then use the SCAG ABM to calculate the fair share of the traffic impact fee per DUE, and fair share per square-foot for various non-residential land uses.

Subtask 3.3: Water Capital and Sewer Reconstruction Fees

Bartle Wells Associates (BWA) will work with relevant City departments to review the City's current water and wastewater capacity charges as well as any related policies and procedures. The team will evaluate if the fees equitably recover the full costs of infrastructure and assets benefitting new development and comply with Government Code 66013, and as appropriate, identify potential modifications to the fees, fee structure, or how fees are applied.

BWA will then calculate the current value of the City's water and wastewater system infrastructure and assets. The current value can be calculated by adjusting the original or depreciated value of each facility or asset into current dollars using the Engineering News-Record Construction Cost Index, a widely-used measure of construction cost inflation. Alternatively, system value can be based on an inventory of utility system infrastructure.

Using the above information, BWA will equitably allocate anticipated capital improvement costs for each type of asset to existing and future users based on input from City staff. Some projects may entirely benefit one group while others will provide a portion of benefit to both correct existing system deficiencies and provide new capacity for growth.

Finally, BWA will work with City staff to identify the capacity of water and wastewater system infrastructure and/or future service levels each utility is expected to serve, such as through buildout. Wastewater system capacity can potentially be based on the permitted capacity of the wastewater treatment plant, engineering master plans, or projected wastewater flows and loadings. Water system capacity can be based Urban Water Management Plan projections, engineering master plans, or other estimates of projected water demands through buildout. The team will also work with City staff to evaluate alternative fee structures and methods for applying capacity charges to new residential, commercial, and industrial connections. For example, BWA sometimes recommends that residential fees be applied per dwelling unit, potentially with standard charges per single family home and reduced charges for multi-family residential dwelling units. BWA also often recommends that commercial capacity charges be applied based

both on water meter size and wastewater customer class. BWA will also evaluate fee structures for industrial accounts and accessory dwelling units.

Based on appropriate and technically sound methodology, and evaluation of alternative approaches, BWA will develop updated water and wastewater capacity charges.

Subtask 3.3: Storm Drainage Fees

BWA and EPS will review relevant City plans and work with City staff to determine the directly connected impervious area factors (DCIA Factors) associated with each land use to be charged for storm drainage. The Team will then use these factors to assign relevant storm drainage improvement costs established in **Task 2** to new development by land use category. The Team will work with City staff to determine if costs and cost allocations should be determined separately for specific basins or development areas.

Subtask 3.4: Maximum Allowable Fee Calculation

Based on the above described nexus analyses, the EPS team will establish the maximum allowable fee level, comprising the fees for each facility category, for each land use. This information will be incorporated into the Nexus Study Report prepared by EPS in **Task 6**. EPS will summarize the fees by improvement type and land use for the City to review. With the exception of the Water Capital and Sewer Reconstruction fees (which are exempt from this requirement), the fees will be calculated on a per square foot basis for all uses, including residential uses, as required by AB 602. Additionally, the Team will calculate fees for ADUs that conform with State regulations. The fees will include an administrative component to cover the cost of fee program implementation and oversight.

The nexus methodology will satisfy the following Mitigation Fee Act requirements:

- Identify the purpose of the fee.
- Identify the use of the fees. If the use is financing public facilities, the facilities must be identified.
- Determine how there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed.
- Determine how there is a reasonable relationship between the need for a public facility and the type of development project on which the fee is being imposed.

The resulting calculated fees will represent a maximum justifiable fee for each land use type. Fees may be refined based on other considerations including comparison with peer jurisdictions (described in **Task 5**) and consideration of other types of fiscal contributions from new development.

Task 4: Affordable Housing Commercial Linkage Fee

EPS will calculate affordable housing impact fees for commercial development through the preparation of a commercial linkage fee nexus analysis. The nexus (i.e., linkage) between new nonresidential development and the demand for affordable housing is derived by preparing employment density and compensation estimates of future employees for several nonresidential land use types (e.g., retail, office, industrial, lodging, etc.). The demand by land use category will be converted into a fee, on a per-building-square-foot basis, based on the affordability gap with regard to very low, low, and moderate-income household earnings and the typical cost of housing in Paramount.

The maximum nexus-supported fees generated by the industry-standard analysis are often significantly higher than jurisdictions have wished to implement. The City staff may consider the findings from the optional fee survey (**Task 5**), common feasibility thresholds for fees on commercial development, and the City's economic and community development objectives to determine an appropriate fee level to recommend.

Task 5: Fee Comparison Analysis

The maximum allowable fee levels are only the starting point to the implementation and approval process since decision-makers may ultimately approve a lower fee to advance economic and other policy considerations. Once the preliminary impact fee is derived, the City may wish to evaluate and consider potential impacts on local economic development goals.

To this end, the EPS Team proposes to conduct a comparison of development impact fees between the proposed updated fees for the City and up to four (4) peer jurisdictions (selected in dialogue with City staff). The goal will ensure that the proposed fees are in-line with regional trends, taking into account differences in local economies. The EPS Team will additionally evaluate the relative financial burden that the fee will place on new development in the City as compared to its peers, based on the local real estate market values. The EPS Team will produce a short technical memorandum summarizing the fee comparison and fee burden analysis. This analysis may result in modifications to the fee program and schedule.

Task 6: Nexus Study Report

Once the fee schedule is finalized, the EPS Team will prepare a Nexus Study Report that documents the assumptions and methodology used to establish the required nexus for creating each fee. The Report will include comprehensive background on the Impact Fee Program and each fee category, as well as detail the technical analysis and clearly describe the nexus findings and rationale for allocating facility cost to new development as required by AB 1600, as well as rationale for any changes to the fee levels as required by AB 602.

The Report will also include recommendations for updating the process of implementing and administering the fee program, including those elements that are ultimately part of

the enabling Ordinance and Resolutions. These elements will include, but are not limited to, fee collection protocol and options for annual standardized cost escalation.

Deliverables under this task will include an Administrative Draft Report for City staff review and comment; a Public Review Draft Report, incorporating one round of staff comments, for review by key stakeholders, elected officials, and the public; and a Final Report incorporating comments arising from the public review draft. The EPS Team will maintain a working database of all documents, interviews, and other resources used in the study. We believe that thorough documentation and transparency is critical to achieving consensus and a successful study outcome. Accordingly, all assumptions and calculations will be clearly sourced, easily replicable, and prepared as user-friendly deliverables.

Task 7: Project Management and Public Outreach

Subtask 7.1: Project Management

In general, the EPS Team's approach to communication is to maintain open channels of dialogue throughout the study process. As such, the EPS Team will respond to inquiries and requests from City staff and stakeholders as they arise, and address and incorporate the information or direction received as appropriate. During the project initiation meeting detailed in **Task 1**, the EPS Team will establish a schedule for regular check-in calls with the City Team. EPS will participate in these calls to report on progress and status of the analysis and to solicit input to potential problems, with staff from Fehr & Peers and Bartle Wells Associates participating as needed. The provided cost estimate assumes these meetings will occur monthly by phone or videoconference, to provide cost savings to the City. The EPS Team can revise these assumptions based on City preferences.

Subtask 7.2: Public Hearings and Outreach

Following the release of the Public Review Draft, EPS will participate in up to two (2) virtual meetings to provide information to and solicit feedback from key community stakeholders, including representatives from the real estate development industry. EPS will work with City staff to finalize the format of these meetings and to develop a list of relevant stakeholders to invite.

EPS will also participate in and present at up to two (2) City Council public hearings related to the Development Impact Fee Program as requested by the City Team, with participation by senior staff from Fehr & Peers and Bartle Wells Associates at up to one (1) hearing if requested. EPS will create tailored presentations designed to articulate to decision-makers the key data and analysis conducted by the EPS Team, and will also be prepared to respond to questions and concerns that arise within the hearing setting. If requested by the City, EPS will also review the ordinance and resolution language and provide feedback, and will consult with the City's legal counsel on the nexus between the projects funded through the program and citywide benefits. EPS will also be available to assist City staff in drafting a staff report for City Council on the findings of the nexus

study and fee level recommendations. The cost estimate for the public hearing participation assumes in-person attendance by EPS Team members.

Project Timeline

The EPS Team is available to begin work on this study immediately upon authorization to proceed and is prepared to complete the scoped work within approximately **six (6) months** of engagement. This schedule assumes that the required input and data from City staff is provided in a timely manner. In addition, the exact timing of the stakeholder meetings and public hearings will be dependent on participant availability and City meeting schedules and agendas. The proposed project schedule is shown in **Figure 1** below.

Figure 1 Proposed Project Timeline

Description	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Task 1 - Project Initiation and Document Review	M					
Task 2 - Data Collection and Development of Project List						
Task 3 - Nexus Analysis and Impact Fee Calculations						
Task 4 - Affordable Housing Commercial Linkage Fee						
Task 5 - Comparative Fee Analysis (Optional)						
Task 6 - Nexus Study Report				D	D	F
Task 7 - Project Management and Public Outreach [1]		V	V	V	V V	M M

[1] Includes in-person participation in two (2) stakeholder meetings and two (2) City Council meetings.

KEY:

	Ongoing Work
V	Virtual Meeting
M	In-Person Meeting
D	Draft / Interim Deliverable
F	Final Deliverable

3. Qualifications and References

Consulting Team Profiles

About EPS



Economic & Planning Systems, Inc. (EPS) is a land economics consulting firm experienced in the full spectrum of services related to real estate development, the financing of public infrastructure and government services, land use and conservation planning, and government organization.

EPS was founded on the principle that real estate development and land use-related public policy should be built on a realistic assessment of market forces and economic trends, feasible implementation measures, and recognition of public policy objectives, including provisions for required public facilities and services. The firms' areas of expertise are as follows:

- Real Estate Economics
- Public Finance
- Land Use and Transportation
- Economic Development and Revitalization
- Fiscal and Economic Impact Analysis
- Housing Policy
- Public-Private Partnership (P3)
- Parks and Open Space Economics

Since 1983 EPS has provided consulting services to hundreds of public- and private-sector clients in Colorado and throughout the United States. EPS has offices located in Denver, Colorado, and Oakland, Sacramento, and Los Angeles, California. EPS clients include cities, counties, special districts, education and other non-profit institutions, multi-jurisdictional authorities, property owners, developers, financial institutions, and land use attorneys.

The professional staff includes specialists in public finance, real estate development, land use and transportation planning, and government organization. The firm excels in preparing concise analyses that disclose risks and impacts, support decision making, and provide solutions to real estate development and land use-related problems.

Impact Fee Services

EPS has evaluated, recommended, or supported implementation of a broad range of financing mechanisms for infrastructure improvements and ongoing public services. Specific services provided by EPS include forecasting demand to assist in infrastructure design, sizing, and timing; allocating capital costs among participating entities; identifying, forecasting, and establishing various funding mechanisms; formulating nexus studies/fee schedules, assessment rates, Special Tax Formulas, and fee ordinances; and assessing the impacts of capital financing alternatives on project feasibility and public finance negotiations.

EPS has particular expertise in the preparation of impact fee studies and programs, and has worked with dozens of cities, counties, and special districts to provide these services. EPS's impact fee-related products and services range from single-purpose fees focusing on particular facilities or sub-areas to more comprehensive, multi-improvement programs spanning entire cities or numerous jurisdictions. The firm is well-versed in the requirements of the Mitigation Fee Act (AB 1600) and associated legislation, and our impact fee work often includes revenue projections as well as assessments of the fees' impacts on new development.

Our expertise in real estate economics allows us to help public agencies ensure that desired private development investments remain feasible while also contributing to public improvements. This is particularly important where cities are considering the adoption of numerous new fees and other development charges. Also, our expertise in fiscal impact analysis helps public agencies understand the ongoing financial consequences of their public investment decisions.

About Fehr & Peers

FEHR & PEERS Fehr & Peers specializes in providing transportation planning and engineering services to public- and private-sector clients since 1985. Fehr & Peers develops creative, cost-effective, and results-oriented solutions to planning and design problems associated with all modes of transportation.

Impact Fee Services

Fehr & Peers has applied its skills in transportation planning and funding to the development of impact fee programs for more than 50 jurisdictions throughout the State of California (State). Fehr & Peers combines a comprehensive understanding of the requirements of Assembly Bill (AB) 1600 with its top-notch technical skills in developing and applying travel models and other analytical techniques to establish the nexus between new development and the accompanying need for transportation improvements. Fehr & Peers has worked with many of the leading urban economists and land use attorneys around the State to ensure its fee programs are economically feasible, legally defensible, and responsive to the specific needs and circumstances of the local agency. Past clients regularly contact Fehr & Peers to prepare updates of fee programs that Fehr & Peers originally helped to develop, underlining both the success of the original

program and Fehr & Peers' long-standing commitment to maintaining close working relationships with its local clients over many years.

About Bartle Wells Associates



Bartle Wells Associates (BWA) is an independent financial advisory firm with expertise in the areas of water, wastewater, and solid waste finance. BWA was established in 1964 and has over 50 years of experience advising cities, special districts, and other agencies on the complexities and challenges in public finance. We have advised over 600 public agency clients throughout California and the western United States. We have a diversity of abilities and experience to evaluate all types of financial issues faced by local governments and to recommend the best and most-practical solutions.

Bartle Wells Associates has a highly qualified professional team of five consultants. Our educational backgrounds include finance, civil engineering, business, public administration, public policy, and economics.

BWA specializes in three professional services: utility cost-of-service rate and fee studies, financial plans, and project financing. We are one of the few independent financial advisors providing all three of these interrelated services to public agencies.

Rate and Fee Study Services

Our rate studies employ a cost-of-service approach and are designed to maintain the long-term financial health of a utility enterprise while being fair to all customers. We develop practical recommendations that are easy to implement and often phase in rate adjustments over time to minimize the impact on ratepayers. We also have extensive experience developing impact fees that equitably recover the costs of infrastructure required to serve new development. BWA has completed hundreds of utility rate and fee studies. We have helped communities implement a wide range of rate structures and are knowledgeable about the legal requirements governing rates and impact fees. We develop clear, effective presentations and have represented public agencies at hundreds of public hearings to build consensus for our recommendations.

Key Personnel

The EPS Team will include highly qualified and experienced individuals from the three participating firms to successfully complete this study in concert with the ongoing efforts of the City and other stakeholders. A brief description of the role and background of the key staff assigned to this effort is provided below. Resumes for each staff person can be found in **Appendix A**.

Julie Cooper, Principal, EPS

Role: Overall Principal-in-Charge and Project Manager

Julie will serve as EPS Principal-in-Charge, directing all aspects of the work, providing technical expertise and guidance and overseeing completion of project deliverables. Julie

has ten years of experience in land use economics consulting and directs the firm's Southern California practice. She has managed EPS's recent and ongoing work on several development impact fee studies across Southern California, including a comprehensive fee update for the City of Burbank; transportation impact fee updates for the cities of Carlsbad, Anaheim, and Orange; and a parks impact fee update for the city of Oceanside. She is also currently managing EPS's work on the Clearwater East Specific Plan in the City of Paramount. Julie is a member of EPS's internal DIF working group, which monitors changes to impact fee legislation and regulation and meets regularly to discuss best practices in impact fee development.

Teifion Rice-Evans, Managing Principal, EPS

Role: EPS Senior Advisor

As senior project advisor, Teifion will provide input and guidance in developing the impact fee program. Teifion has over 30 years of experience with EPS and has worked extensively on development impact fee studies throughout California. Teifion has helped development fee programs, updates, and analyses for the cities of Santa Monica, West Covina, San Luis Obispo, Calistoga, and Vacaville and for regional entities, including the Western Riverside Council of Governments and Contra Costa Transportation Authority. In addition to being an experienced impact fee practitioner, he has been heavily involved in adopting robust ways to adjust methodologies to respond to recent State legislation (AB 602).

Erik Helgeson, Principal, Bartle Wells Associates

Role: BWA Principal-in-Charge and Project Manager

Erik is a principal consultant and vice-president of BWA. He has 13 years of utility finance experience. His areas of expertise include the development of financial plans, ratemaking, and policy solutions for water, wastewater, recycled water, stormwater, and solid waste utilities. His experience includes both working for a utility as a senior finance analyst for Denver Water and now as a utility rate consultant helping agencies develop strong financial plans and equitable rates aligned with their objectives. Erik has extensive expertise in working with executive level staff and assisting in strategic decisions. He serves on the American Water Works Association (AWWA) Rates Charges Committee, is a contributing author to the 8th edition of the AWWA M1 Manual and has presented at the Utility Management Conference.

John Muggridge, Principal, Fehr & Peers

Role: Fehr & Peers Principal-in-Charge

John is a principal, senior market leader, and skilled project manager with over 25 years of experience in transportation planning and engineering. John serves as a trusted consultant to private clients and public agencies across southern California. John's skillset spans a variety of multi-disciplinary transportation planning and research topics, including travel demand modeling, parking studies, environmental and CEQA services, and multimodal planning. He frequently manages complex projects and has retained relationships with key clients for a number of decades, due to the expertise and quality he provides. John has worked closely with EPS on several development impact fee

studies, including in the cities of Culver City and West Hollywood, in the West Los Angeles neighborhood, and for the County of Ventura.

Fatemeh Ranaiefar, Senior Associate, Fehr & Peers

Role: Fehr & Peers Project Manager

Fatemeh is a senior associate with Fehr & Peers, specializing in transportation modeling, transportation data analytics, developing performance measures, and building decision support tools for prioritizing projects to address transportation issues. She has experience managing large scale projects involving coordination with various groups of public and private stakeholders and community organizations. She also managed/or served as task lead for several statewide, regional and multi- jurisdiction corridor studies, impacts fee programs, truck route study, travel demand model development, traffic forecast, goods movement plan, truck parking study, origin-destination study and National Cooperative Highway Research Programs studies.

References and Project Experience

Figure 2 on the following page provides a representative list of clients that EPS has worked with in recent years to complete development impact fee studies. This is followed by detailed descriptions of several projects completed by EPS, in collaboration with Fehr & Peers and Bartle Wells Associates, that involved tasks similar to those requested by the City. Contact information for associated references is included with each description, as well as links to the completed nexus studies where available.

Figure 2: Representative List of Development Impact Fee Studies Completed by EPS

Comprehensive Development Impact Fee Programs

Vacaville Comprehensive Fee Update
Burbank Capital Facilities Fee Update
Foster City Comprehensive Fee Update
City of Pleasanton Comprehensive Fee Update
City of Belmont Comprehensive Development Impact Fee Program
Fairfield Capital Facility Fee
Turlock Capital Facilities Fee Nexus
Newark Public Facilities Impact Fee Study
Madera Public Facilities Impact Fee Study
Union City Capital Facilities Program and Fee
Alameda Capital Facilities Fee Program
Santa Rosa Capital Facilities Fee
South San Francisco Public Facilities Impact Fee Nexus Study
Westminster Comprehensive Impact Fee Study
Calistoga Comprehensive Impact Fee Nexus Study
Antioch Public Facilities and Transportation Nexus Study
Martinez Comprehensive Development Impact Fee
Pleasanton Comprehensive Fee Program
Solano County Comprehensive Impact Fee Study
Fresno Comprehensive Impact Fee Study
West Covina Public Facilities Fee Program
San Luis Obispo Infrastructure Financing Analysis
Benicia Comprehensive Fee Program
San Bruno Comprehensive Fee Program
Woodland Major Projects Financing Plan and Fee Nexus Study

Transportation Development Impact Fees

Orange Transportation Impact/VMT Mitigation Fee
LA Ventura Cahuenga Blvd. Corridor VMT Mitigation Fee
Fresno Major Street Impact Fee Nexus Study
Grass Valley Traffic Impact Fee Program Nexus Study
Dublin Downtown Transportation Impact Fee Update
East Contra Costa Regional Transportation Impact Fee
San Joaquin Regional Transportation Impact Fee Program
Coachella Valley Regional Transportation Fee Program
Solano County Regional Transportation Fee Program
Ukiah Regional Transportation Fee
Cupertino Traffic Impact Fee & Nexus Study
West Los Angeles Regional Transportation Nexus Study
Martinez Road and Parks Impact Fee Study

Area Development Impact Fees

Milpitas Transit Station Area Impact Fee
Santa Clara Tasman East Area Fee
San Bruno Bayhill Area Fee
Millbrae Transit Station Area Impact Fee
Mountain View North Bayshore Traffic and Utility Impact Fee
Santa Rosa SW and SE Development Impact Fee Updates
Sacramento North Natomas Financing Plan, and Nexus Study
Santa Clara Tassman East Area Fee
Sacramento Railyards Infrastructure Financing Plan & Nexus Study
Turlock East Area Specific Area Plan Fee
Yuba East Linda Specific Plan Road and Park Fee Update
Elk Grove Laguna South Public Facilities Fee Program
Yuba County Plumas Lake / North Arboga Road Fee Nexus Study
Eastern Elk Grove Park and Fire Fee Nexus Study
Napa Big Ranch Road Area Development Impact Fee Study

Affordable Housing Residential Nexus Studies

San Bruno Affordable Housing In-Lieu Fee
Newport Beach Housing In-Lieu Fee
Pleasanton Lower Income Housing Fee
Palm Desert Affordable Housing Linkage Fee
Santa Rosa Affordable Housing In-Lieu Fee
Mountain View Affordable Housing Nexus Analysis
Rohnert Park Inclusionary Housing In-Lieu Fee
Sunnyvale Affordable Housing Nexus Study
Sonoma County Workforce Housing Linkage Study

Habitat Conservation Fee Studies

Santa Monica Mountains Habitat Mitigation Fee (LA County)
Western Riverside County Multi-Species Habitat Conservation
North Natomas Habitat Conservation Plan (City of Sacramento)
San Joaquin County Multi-Species Habitat Conservation Plan
Los Osos Habitat Conservation Plan (San Luis Obispo County)
East Contra Costa County Habitat Conservation Plan

Development Fee Program Economic Analysis

Mammoth Lakes Development Impact Fee Review
Santa Cruz County TIF Review and Recommendations
Economic Analysis of West Los Angeles Area Transportation Fee
Economic Analysis of Culver City Mobility Fee

Capital Facilities Fee Update (EPS and Fehr & Peers)

Burbank, California

Entity: City of Burbank

Project Manager: Beverly Ibarra, Senior Administrative Analyst

Phone Number: (818) 238-5262

Email: BIbarra@burbankca.gov

Project Start and End Dates: 5/7/2014–6/30/2022

Project Description: The City of Burbank was interested in updating its existing development impact fees and investigating the addition of several new fee categories. While the city's traditional residential neighborhoods have approached buildout, the commercial and industrial areas are experiencing significant growth pressures driven by the city's competitive attributes in a thriving regional economy. The City's existing fee structure was based on outdated growth assumptions and had failed to capture "fair share" fiscal contributions from high-growth development sectors—media studio, multifamily residential, and lodging, primarily.

EPS and Fehr & Peers worked with the City's Community Development Department to perform an AB 1600 nexus analysis that would revise the existing fee program, incorporate new fee categories, and broadly consider financing and economic implications. The existing fee categories included fire, police, parks, libraries, and transportation, while the new fee categories included information technology. The study process included: data collection on population growth projections; interviews with City departments to clarify the goals and standards of the nexus analysis and to discuss infrastructure needs; and, calculation of maximum justifiable fees based on infrastructure cost information provided by the City.

After calculating the proposed fees, EPS performed a competitiveness analysis, evaluating the existing and proposed total fee burden in Burbank relative to fees in neighboring jurisdictions. As a subconsultant to EPS, Fehr & Peers reviewed existing and new transportation projects in the city and conducted a nexus analysis to relate the needs for the identified transportation improvements to new development. The updated fee program was adopted by City Council in June 2022. The final nexus study can be accessed here:

https://burbank.granicus.com/MetaViewer.php?view_id=42&clip_id=9846&meta_id=398595

Vacaville Comprehensive Fee Update (EPS and Bartle Wells Associates)

Vacaville, California

Entity: City of Vacaville

Project Manager: Gwen Owens, Deputy Director/City Traffic Engineer

Phone Number: (707) 449-5174

Email: gwen.owens@cityofvacaville.com

Project Start and End Dates: 4/30/2018–8/24/2022

Project Description: After the completion of its 1990 General Plan, the City of Vacaville (City) established a comprehensive Citywide development impact fee program to ensure new development helped fund the new infrastructure and capital facilities required to serve this growth. The City's fee program included fee to help cover the capital costs of: (1) Traffic; (2) Parks and Recreation; (3) Public Safety; (4) General Administrative Facilities; (5) Drainage; (6) Sewer; and (7) Water. The City completed and adopted a General Plan Update in 2015 which guides the City's planning and development through 2040 and, in 2021, asked EPS and other technical consultants to prepare a Comprehensive Development Impact Fee Update (DIF Update) Nexus Study.

EPS worked closely with City staff and stakeholders to oversee the comprehensive 2022 fee program update process, to develop the required technical report/ nexus study, and to present to City Council and stakeholders. This fee program was one of the first comprehensive fee programs to distinguish residential fees by residential unit size. Technically, EPS was responsible for updating the parks and recreation, public safety, general administrative, and storm drainage facilities fees, while other consultants, including Bartle Wells Associates, completed the technical work for transportation, water, and sewer fees. As part of this work effort, EPS also worked closely with the City to develop a clear definition of existing and future growth in the City; to ensure the technical analysis was consistent with the Mitigation Fee Act, more recently adopted AB 602, and other court rulings; and to provide a comprehensive comparison of fees with neighboring and peer jurisdictions to inform City Council decisions. The nexus reports can be viewed online here: <https://www.cityofvacaville.gov/government/community-development/forms-and-fees/development-impact-fees/report>

Foster City Comprehensive Fee Update (EPS)

Foster City, California

Entity: City of Foster City

Project Manager: Marlene Subhashini, Assistant City Manager

Phone Number: (650) 286-3239

Email: msubhashini@fostercity.org

Project Start and End Dates: 6/28/2021–6/20/2022

Project Description: The City of Foster City, as one of the only cities in San Mateo County without development impact fees, hired EPS to produce a nexus study establishing a full suite of development impact and commercial linkage fees to help finance future capacity-enhancing City projects. EPS led a consultant team that included a transportation consultant and coordinated extensively with City staff throughout the effort. Utilizing

planned capital improvement project information from City staff, EPS established defensible maximum fee levels for the categories of Parks, Public Safety, Transportation, and Affordable Housing (via the Commercial Linkage Fees), to be applied to future residential and non-residential development. EPS ensured the nexus study was compliant with the then-newly adopted AB 602 legislation. EPS assisted City staff through a range of fee implementation policy considerations, culminating in Foster City's June 20th, 2022 City Council Meeting, in which the EPS Nexus Study was approved and adopted. The completed nexus studies can be viewed here:

<https://www.fostercity.org/commdev/project/development-impact-fee>

Transportation System Improvement Program Impact Fee (EPS and Fehr & Peers)

Orange, California

Entity: City of Orange

Project Manager: Larry Tay, City Traffic Engineer

Phone Number: (714) 744-5534

Email: ltay@cityoforange.org

Project Start and End Dates: 12/10/2019–10/31/2020

Project Description: The City of Orange engaged a consultant team led by EPS and including Fehr & Peers to prepare an update of the City's Transportation System Improvement Program (TSIP) development impact fees. The updated fees reflected several major changes to the TSIP. The original TSIP primarily funded projects improving roadway level of service, while the updated TSIP sought to serve current General Plan projections and to include VMT-reducing projects, including bicycle and pedestrian improvements, complete streets enhancements, traffic calming measures, and transit improvements. In addition, the fee update shifted the existing trip-based fee schedule to a vehicle-miles-traveled based schedule, and the overall project list was created to achieve a net reduction in VMT so that payment towards the fee program could be used as a VMT-reduction credit consistent with the City of Orange SB 743 guidelines. Finally, the TSIP fees were modified from area-based fees to citywide fees, reflecting a more holistic approach to addressing the City's transportation needs.

The nexus study quantified the allocation of the proposed transportation improvements to new growth in the City and calculated the maximum allowable citywide fee by land use category. As part of the study process, Fehr & Peers developed a VMT-based fee schedule by combining trip generation and average trip lengths of common land-use types. Additionally, EPS collected data on fees charged in peer cities and evaluated the economic burden of the calculated fees on new development projects relative to the City's existing fees and those charged in peer cities. Both EPS and Fehr & Peers provided support during public hearings, facilitated discussions with the Building Industry Association to help the City reach a consensus on a fee level, and provided language to update the city ordinance. The updated TSIP was adopted by the City Council in October 2020.

4. Required Statements

- a. All charges for services will be a "Not-To-Exceed" fee, as submitted with and made part of EPS's quote in the following section.
- b. The attached hourly rate schedules in the following section are part of the EPS Team's quote for use in invoicing for progress payments and for extra work incurred that is not part of this RFP.
- c. EPS agrees to adhere to all federal laws and regulations notwithstanding any state or local laws and regulations. In case of conflict between federal, state, or local laws or regulations, the strictest shall be adhered to.
- d. EPS authorizes federal, state, county, and the City officials access to place of work, books, documents, papers, fiscal, payroll materials, and other relevant contact records pertinent to this project. All relevant records shall be retained for at least three (3) years.
- e. EPS will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin.
- f. EPS shall comply with the California Labor Code., pursuant to said regulations entitled: Federal Labor Standards provisions; Federal Prevailing Wage Decision; and State of California Prevailing Wage Rates, respectively.
- g. EPS shall comply with Copeland Anti-kickback Act (18 USC 874 C) and the implementation regulation (29 CFR 3) issued pursuant thereto, and any amendments thereof.

5. Proposed Budget

The EPS Team agrees to complete the above work program for a not-to-exceed budget of **\$215,850**. A detailed breakdown of the proposed budget by task with details on estimated hours and hourly rate of staff is shown on **Figure 3** on the following page.

The EPS Team reserves the right to re-allocate budget between tasks without Client’s consent so long as the total budget amount is not exceeded. EPS submits invoices based on actual staff time spent and direct reimbursables, charged at standard hourly rates billed on quarter hour increments. Direct expenses for travel and other reimbursable are billed at cost, without mark-up. EPS will submit consolidated invoices monthly on behalf of the entire team with itemized staff and reimbursable expenses. Undisputed invoices that are payable within one month of receipt. As requested in the RFP, billing rates for the EPS Team are included following the budget table.

Figure 3: Proposed Budget Estimate

	Economic & Planning Systems Staff			Fehr & Peers Staff					Bartle Wells Associates Staff		Hours by Task	Direct Expenses*	Budget by Task
Tasks	Principal-in-Charge/Project Manager	Senior Advisor	Analyst	Project Manager	Principal-in-Charge	Modeler	Analyst	Admin Support	Principal	Analyst			
2024 Billing Rates	\$300	\$340	\$240	\$270	\$330	\$190	\$170	\$150	\$270	\$140			
Task 1 - Project Initiation and Document Review	6	2	14	4	2	0	0	4	2	2	36	\$500	\$9,500
Task 2 - Data Collection and Development of Project List	24	6	40	8	4	0	16	0	24	28	150	\$0	\$35,440
Task 3 - Nexus Analysis and Impact Fee Calculations	30	6	50	28	14	76	40	20	40	40	344	\$0	\$75,860
Task 4 - Affordable Housing Commercial Linkage Fee	10	0	50	0	0	0	0	0	0	0	60	\$500	\$15,500
Task 5 - Comparative Fee Analysis	8	0	30	0	0	0	0	0	0	0	38	\$0	\$9,600
Task 6 - Nexus Study Report	16	6	30	30	20	16	16	10	50	16	210	\$0	\$51,740
Task 7 - Project Management and Public Outreach [1]	16	6	10	12	8	0	0	3	4	4	63	\$1,000	\$18,210
ESTIMATED TOTAL PROJECT HOURS	110	26	224	82	48	92	72	37	120	90	691	\$2,000	
ESTIMATED PROJECT BUDGET													\$215,850
*includes mileage, travel expenses, data purchases etc.													

[1] Includes participation in two (2) virtual stakeholder meetings, two (2) in-person City Council meetings, and monthly virtual check-ins with City staff.

EPS 2024 Hourly Billing Rates

Managing Principal	\$340
Senior Principal	\$375
Principal	\$300–\$315
Vice President	\$265
Senior Technical Associate	\$275
Senior Associate	\$240
Associate	\$205
Production and Administrative Staff	\$125

Billing rates updated annually.



2023-2024

(July 2023 through June 2024)

Hourly Billing Rates

Classification	Hourly Rate		
Principal	\$250.00	-	\$380.00
Senior Associate	\$210.00	-	\$310.00
Associate	\$185.00	-	\$275.00
Senior Engineer/Planner	\$160.00	-	\$235.00
Engineer/Planner	\$130.00	-	\$200.00
Senior Engineering Technician	\$150.00	-	\$225.00
Senior Project Accountant	\$170.00	-	\$210.00
Senior Project Coordinator	\$130.00	-	\$215.00
Project Coordinator	\$115.00	-	\$175.00
Technician	\$120.00	-	\$185.00
Intern	\$100.00	-	\$135.00

- *Other Direct Costs / Reimbursable expenses are invoiced at cost plus 10% for handling.*
- *Personal auto mileage is reimbursed at the then current IRS approved rate (67 cents per mile as of Jan 2024).*
- *Voice & Data Communications (Telephone, fax, computer, e-mail, etc.) are invoiced at cost as a percentage of project labor.*

Fehr & Peers reserves the right to change these rates at any time with or without advance notice.



BARTLE WELLS ASSOCIATES
BILLING RATE SCHEDULE 2024

Rates Effective 1/1/2024

Professional Services

Financial Analyst I	\$120 per hour
Financial Analyst II	\$140 per hour
Associate Consultant	\$160 per hour
Consultant	\$180 per hour
Senior Consultant.....	\$210 per hour
Project Manager	\$240 per hour
Principal Consultant	\$270 per hour

The hourly rates for professional services include all overhead and indirect expenses. Bartle Wells Associates does not charge for administrative support services. Expert witness, legal testimony, or other special limited assignments will be billed at one and one-half times the consultant’s hourly rate.

The above rates will remain in effect through December 31, 2024, at which point they will be subject to annual adjustment by three percent effective January 1 of each subsequent year, rounded to the nearest dollar.

Appendix A: Resumes



Julie Cooper

Principal



Education

Master of Public Policy,
Harris Public Policy at the
University of Chicago, 2014
*Certificate in Municipal
Finance*

Bachelor of Arts, International
Studies, University of
Chicago, 2007

Previous Employment

Associate, Development
Strategies, Saint Louis, MO
(2014-2018)

Policy Intern, Center for
Neighborhood Technology,
Chicago, IL (2013)

Research Assistant, Energy
Policy Institute at Chicago,
Chicago, IL (2012-2013)

Affiliations

American Planning
Association

Urban Land Institute

NABE Los Angeles Chapter

Lambda Alpha International

ABOUT

Julie Cooper joined EPS in 2018, bringing experience in land use, economic, and community development consulting. Julie has worked with a variety of public, private, and institutional clients, providing analysis of market and economic conditions, development feasibility and fiscal impact modeling, and strategic policy and public financing recommendations. She also has extensive experience in stakeholder and community engagement. Before joining EPS, Julie served as an Associate at Development Strategies, a St. Louis-based consulting firm.

SELECT PROJECT AND PROFESSIONAL EXPERIENCE

City of Burbank Comprehensive Development Impact Fee Program

EPS conducted a comprehensive Development Impact Fee Nexus Study for the City of Burbank that included parks and recreation, transportation, library, public safety, and other public facilities. Julie served as deputy project manager and primary analyst, coordinating with and collecting data from city departments on facilities needs, building the fee model, and working on the nexus study document. The City Council adopted the updated fee program in June 2022.

City of Orange Transportation System Improvement Program Fee Update

EPS was engaged by the City of Orange to lead a team including Fehr & Peers to update the City's Transportation System Improvement Program impact fee. The analysis included updating the City's project list to better reflect anticipated transportation infrastructure needs; establishing the nexus between needed improvements and new development; and calculating the maximum allowable fee on new development by land use type based on VMT impacts. EPS also conducted a comparison of peer city fee programs to inform the adopted fee level. The City Council adopted the updated fee in October 2020. Julie served as EPS project manager and primary researcher/analyst.

City of Oceanside Parks Impact Fee Update

EPS has been engaged by the City of Oceanside to update its parks impact fee. EPS's work has included a review of existing and adopted service standards; development of an impact fee CIP to reflect future facility needs and associated costs; and completion of a public draft nexus analysis that is compliant with the requirements of AB 1600 and AB 602. EPS has additionally engaged with key stakeholders in the parks advocacy and real estate developer community. Julie has served as EPS project manager and primary researcher/analyst for the study.

Culver City Commercial Linkage Fee Study

EPS worked with the City of Culver City to develop an affordable housing linkage fee program for new commercial development, to address the impacts of new businesses on housing supply and affordability for their workers. The program complements the City's other affordable housing initiatives, including an inclusionary housing program under consideration. EPS's work included the technical nexus analysis needed to support the fee, outreach to key stakeholders and community members, and feasibility analysis to provide guidance on a fee level that is supportable by new development. As Project Manager, Julie acted as a point-of-contact for City staff, oversees research and technical analysis by the EPS team, and is actively involved in stakeholder and community outreach efforts. The City Council adopted the commercial linkage fee in 2021.



Teifion Rice-Evans

Managing Principal



Education

Master of Arts in Economics,
University of Cambridge

Bachelor of Arts in
Economics, University of
Cambridge

Selected Lectures

COVID-19: Economic and
Fiscal Vulnerability and
Impacts Webinar; WRCOG
April 2020

California American Planning
Association 2016 Conference:
The LA Waterfront

California American Planning
Association 2015 Conference:
Regional Collaboration,
Competitiveness, and
Prosperity

ULI Workshop: Real Estate
Market and Feasibility
Analysis, 2005

The Nature Conservancy,
2000 and 2002: Land
Acquisition and Valuation

Awards

California American Planning
Association – South
Fremont/Warm Springs
Revitalization Plan

Association of Environmental
Professionals –Award for
Outstanding Resource
Document – East Contra
Costa County HCP/NCCP

Affiliations

American Real Estate and
Urban Economics Association

American Planning
Association

ABOUT

Teifion Rice-Evans is a land use economist with over thirty years of experience. He directs complex consulting assignments in the interconnected areas of public finance, real estate economics, public/private partnerships, and community benefits. Teifion has particular expertise in working on plans and projects where a careful blend of economic, financing, and policy expertise is required to craft viable and supported paths forward. He is a leader in the firm's development impact fee practice.

SELECTED PROJECT EXPERIENCE

City of Vacaville Comprehensive Development Impact Fee Study

EPS updated the City of Vacaville's comprehensive development impact fee program that was originally adopted in the early 1990's. EPS oversaw the update of the parks and recreation, public buildings, and storm drain fees, and, with support from subconsultants, the transportation, water, and sewer fees. EPS prepared the nexus studies, conducted public outreach, and presented to City Council.

Western Riverside County Transportation Fees/ Economic Competitiveness

For the Western Riverside Council of Governments, EPS conducted a major fee comparison looking at fees in over 30 jurisdictions across four Southern California counties, including Western Riverside County. This regional fee comparison has helped these jurisdictions understand the differences and similarities between their fee programs and fee levels.

City of Redwood City Parks Impact Fee and Quimby Act Fee Update

EPS worked closely with City staff and City legal counsel to update the City's parks fee programs. EPS updated both the parks development impact fee and the Quimby Act parkland in-lieu fee and made sure the two programs worked appropriately together. EPS developed all of the technical work, wrote the nexus study, and presented at public meetings.

City of Calistoga Comprehensive Development Impact Fees

EPS worked with the City of Calistoga to adopt its first development impact fee program. This fee program covered public safety, parks, transportation, and other civic facilities. EPS also developed affordable housing fees and parking in-lieu fees for the City. EPS is currently conducting the first update to these fees.

City of West Covina Development Impact Fees

EPS worked with the City of West Covina to adopt their first development impact fee program. This fee program covered public safety, parks, and other civic facilities. EPS worked closely with staff on all aspects of the fee study and represented the proposed fee program to City Council for refinement and adoption.

ERIK W. HELGESON

Principal Consultant



Erik Helgeson is a principal and vice president of Bartle Wells and Associates with thirteen years of utility finance experience. His areas of expertise include the development of financial plans, ratemaking, and policy solutions for water, wastewater, recycled water, stormwater and solid waste utilities. His experience includes both working for a utility as a senior finance analyst for Denver Water and now as a utility rate consultant helping agencies develop strong financial plans and equitable rates aligned with their objectives. Erik has extensive expertise in working with executive level staff and assisting in strategic decisions. He serves on the American Water Works Association (AWWA) Rates and Charges Committee and has presented at the Utility Management Conference.

Education

M.B.A., Entrepreneurship – University of Colorado, Denver

B.A., Business Administration – Gonzaga University

Representative Projects

- **Marin Municipal Water District, Marin, CA:** Analyst supporting the financial plan and rate study update in 2016. Project manager for 2022 water and recycled water rate study.
- **Fallbrook PUD, CA:** Project manager for a water, sewer and recycled water rate study
- **Pico Water District, CA:** Water financial plan and cost-of-service rate study
- **Big Bear City CSD, CA:** Water, sewer and solid waste cost-of-service rate studies
- **City of Willits, CA:** Project manager providing water and wastewater financial plans and rate studies
- **San Miguel Community Services District, CA:** Project manager providing water and wastewater financial plans and rate studies. The District was nearing insolvency and large rate increases were needed to save the District.
- **City of Paso Robles, CA:** Water and wastewater rate studies
- **King City, CA:** Wastewater financial plan and rate study
- **Humboldt Bay Municipal Water District, CA:** Lead consultant providing 10-year financial plan update
- **Alameda County, CA:** Reviewed proposed wheeling charges on behalf of the local agency partners working on the Los Vaqueros Dam expansion project.
- **City of Modesto, CA:** Project manager for water and wastewater financial plans and rate studies
- **Modesto Irrigation District:** Designed an allocation methodology between the district's domestic water, irrigation, and electric enterprises.
- **City of Vacaville, CA:** Water and wastewater capacity fee studies
- **Union Sanitary District, CA:** Wastewater capacity fee study
- **City of Riverbank, CA:** Project Manager for solid waste rate and sewer rate and connection fee studies
- **City of Placerville, CA:** Analytical support for water financial plans and rate studies.
- **San Luis Water District, CA:** Prop. 218 Assessment Election
- **Panoche Water District, CA:** Prop. 218 Assessment Election

Erik W. Helgeson continued

- **City of Patterson, CA:** Solid waste rate study
- **Madera County, CA:** Project manager providing rate studies for twenty-three of the county's water and sewer special service districts
- **Carlsbad, CA:** Played a key role in completing the 2016 water cost of service study. Created a supply-based cost allocation and supply layered, tiered, water rate design
- **Castle Pines North Metropolitan District, CO:** Water and wastewater financial plans and rate studies
- **City of Benicia, CA:** Water and wastewater rate and connection fee studies
- **Arapahoe Parks and Recreation District, CO:** Reviewed water rates for fairness
- **City of San Juan Bautista, CA:** Water and Wastewater rate and capacity fee studies
- **Las Gallinas Valley Sanitary District, CA:** Support for annual budget process
- **Tres Pinos CSD, CA:** Project manager for water and sewer rate studies
- **Leland Meadows CSD, CA:** Project manager for water and sewer rate studies
- **City of Hemet, CA:** Water budget rate design and cost of service study
- **City Lindsay, CA:** Water and wastewater rate studies and infrastructure use fee study
- **City of Imperial, CA:** Lead consultant providing water and wastewater financial plans and rate studies
- **The Cities of Pinole and Hercules, CA:** Assisted the cities with the co-financing of a wastewater project with SRF loans. This included the design of the payment and reimbursement process, the administration of the process, and navigating the State requirements.
- **Sacramento County Water Authority, Sacramento, CA:** Water financial plan and rate study

Public Utility Experience

Denver Water, Denver, CO:

Senior Finance Analyst- Assisted with the annual cost of service study and financial plan, provided regular revenue reports, and oversaw the gathering and reporting of metrics to support Denver Water's organizational improvement initiatives. As the lead analyst on the initiative to change the rate design he facilitated research (customer survey and affordability study), performed rate design analysis, and assisted with stakeholder outreach (municipalities, customers, business representatives, non-profits, and Denver Water executives and Board) which led to the adoption of new rate structures. He coordinated the implementation efforts between various business units to ensure a successful rollout of the new rates and rate structures.

Professional Memberships

American Water Works Association – Member of Rates and Charges Committee, Contributing Author of the AWWA M1 Manual "Principles of Water Rates, Fees and Charges"

Certifications

MSRB-Registered Municipal Advisor (Series 50)



John Muggridge, AICP

Principal

EDUCATION

Master of Science, Transportation Planning and Engineering, University of Leeds

Bachelor of Engineering, Mechanical and Process Engineering, University of Sheffield

REGISTRATIONS

American Institute of Certified Planners (021879)

YEARS OF EXPERIENCE

Total: 26

With Fehr & Peers: 22

AFFILIATIONS

- California Association of Environmental Professionals (AEP)
- American Planning Association (APA)

EXPERTISE

- Bicycle and Pedestrian Planning
- Long-range Multimodal Transportation Planning
- Multimodal Corridor Planning
- Parking Studies
- Land Use and Transportation
- Traffic Analysis
- Transit Planning
- Transportation Demand Management
- Travel Pattern Studies
- Travel Demand Modeling

ABOUT

John is a principal, senior market leader, and skilled project manager with over 25 years of experience in transportation planning and engineering. John serves as a trusted consultant to private clients and public agencies across southern California. John's skillset spans a variety of multi-disciplinary transportation planning and research topics, including travel demand modeling, parking studies, environmental and CEQA services, and multimodal planning. He frequently manages complex projects and has retained relationships with key clients for a number of decades, due to the expertise and quality he provides.

RELATED EXPERIENCE

- City of Culver City Travel Demand Model Development and Transportation Impact Fee Study
- City of Burbank Transportation Impact Fee Study
- Ventura County Traffic Mitigation Fee Program Update
- City of West Hollywood Transportation Impact Fee Study
- City of Wittier Transportation Impact Fee Study
- City of Burbank General Plan Housing Element Update
- City of Diamond Bar General Plan Update
- City of Carson General Plan
- City of Pasadena General Plan EIR
- City of Rolling Hills Estates General Plan Update
- DTLA 2040: Downtown Los Angeles Community Plan Update
- City of Pasadena General Plan EIR
- San Gabriel Pacific Square Transportation Impact Study
- City of Burbank Downtown Transit Oriented Development Study
- City of Diamond Bar General Plan Update
-



Fatemeh Ranaiefar, PhD

Senior Associate

EDUCATION

PhD, Transportation Science, University of California, Irvine

Master of Science, Industrial Engineering/ System Engineering, TMU, Tehran, Iran

Bachelor of Science, Industrial Engineering, Tehran, Iran

YEARS OF EXPERIENCE

Total: 13

With Fehr & Peers: 10

AFFILIATIONS

- TRB Freight Transportation Economics and Regulations Committee (AT010)– Research Coordinator
- TRB Standing Committee on Freight Transportation Planning and Logistics (AT015)
- Lecturer at University of Southern California (USC)
- Member of California Freight Advisory Committee (CFAC)

EXPERTISE

- Impact Fee Analysis
- Transportation Planning
- Transportation Data Analytics
- Travel Demand Forecasting
- Multimodal Corridor Planning
- Travel Demand Modeling
- Freight Planning

ABOUT

Fatemeh Ranaiefar is a senior associate based locally in the Fehr & Peers Long Beach office. She specializes in transportation modeling, transportation data analytics, developing performance measures, and building decision support tools for prioritizing projects to address transportation issues. She currently leads the firm's internal research and development freight discipline group.

Fatemeh has experience managing large scale projects involving coordination with various groups of public and private stakeholders and community organizations. She also managed/or served as task lead for several statewide, regional and multi-jurisdiction corridor studies, impacts fee programs, truck route study, travel demand model development, traffic forecast, goods movement plan, truck parking study, origin-destination study and National Cooperative Highway Research Programs studies. Fatemeh is passionate about research, education and mentoring next generation of Transportation enthusiasts. She serves on the multiple TRB committees and teaches transportation modeling to Master students at USC. She has provided several training workshops for public agencies and students, empowering them to use transportation data analytics and enhanced visual infographics in their decision-making process.

RELEVANT PROJECT EXPERIENCE

- SCAG Goods Movement Community Impact Study (SCAG Region, CA)
- Riverside County Transportation Commission Logistic Impact Fee Nexus Study (Riverside, CA)
- Ventura County Traffic Mitigation Fee Program Update (Ventura County, CA)
- KARGO Phase II Industrial Impact Fee Nexus Study (Kern County, CA)
- City of Santa Fe Springs General Plan and Housing Element Update
- City of Redondo Beach General Plan and Housing Element Update
- City of Long Beach Via Oro Traffic Study (Long Beach, CA)
- City of Long Beach Pier Wind Terminal EIR/EIS (Long Beach, CA)
- City of Long Beach 4000 Via Oro (Long Beach, CA)
- Goodman Commerce Center TIA (Long Beach, CA)
- Port of Long Beach Community Impact Study (Long Beach, CA)
- Port of Long Beach Master Plan Update (Long Beach, CA)
- SCAG Strategic Freight Plan (SCAG Region, CA)