

The Economics of Land Use



Proposal

Comprehensive Update of Calistoga Development Impact Fee Program

Prepared for:

City of Calistoga

Prepared by:

Economic & Planning Systems, Inc.

In association with:

W-Trans

March 22, 2013

EPS #131015

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1. COVER LETTER

March 22, 2013

Lynn Goldberg
Planning and Building Director
City of Calistoga
1232 Washington Street
Calistoga, CA 94515

Subject: Proposal for a Comprehensive Update of Calistoga
Development Impact Fee Program; EPS #131015

Dear Ms. Goldberg:

Economic & Planning Systems, Inc. (EPS) is pleased to submit this response to the request for proposals (RFP) to conduct a Comprehensive Development Impact Fee Program Update for the City of Calistoga.

EPS is a land use economics consulting firm with offices in Berkeley, Sacramento, Los Angeles and Denver. We have been conducting public financing and development impact fee studies since our inception in 1983. We have a broad practice in developing and updating development impact fee programs, including dozens of projects throughout California. Our analyses provide a rigorous technical basis for fee adoption and update and meet all pertinent legal standards.

Our public finance practice incorporates expertise in a broad range of financing tools and mechanism allowing for appropriate consideration of the manner in which development impact fees can complement other financing tools. As a full service economics consulting firm with extensive experience in real estate market and development feasibility analysis, our development impact fees studies incorporate careful consideration of the potential impacts of new and updated fee programs, both on the provision of quality capital facilities and on the feasibility of new development.

We are excited by the opportunity of working with you and your colleagues on this important project. We have had the opportunity to work in the City of Calistoga previously and believe our broad experience in Napa County and surrounding counties, in resort communities throughout the western U.S., and with development impact fee programs make us a good match for this assignment.

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As the leader of the EPS team, I am personally committed to the success of this engagement. Formation of development impact fee policy to support continued infrastructure and capital facility needs for local governments has long been a specialty of mine. I have been involved in a number of studies on this topic throughout my professional career on behalf of EPS clients. I will participate in a hands-on manner in this project, extensively involved in the analytical effort and readily available for face-to-face meetings or by phone.

We have also asked W-Trans, led by Dalene Whitlock, to join our team. W-Trans is a transportation consulting firm that has extensive experience in conducting technical analysis in support of transportation impact fees. W-Trans also brings extensive experience working in the City of Calistoga.

We would be happy to discuss alterations which may be needed to best serve the City. I can be reached at 510-841-9190 or by e-mail at triceevans@epsys.com.

ECONOMIC & PLANNING SYSTEMS, INC.



Teifion Rice-Evans
Managing Principal

2. INTRODUCTION

Calistoga is a rural community located in the northern Napa Valley. With a population of 5,200, it has experienced modest residential growth over the last decade. However, demands on public services and facilities are expected to increase from several major resort projects in the development pipeline in addition to other incremental development.

Many of the City of Calistoga's development fees have not been updated recently and the City is interested in adopting updated fees to ensure new development covers an appropriate share of new capital facilities cost. At the same time, the City is also concerned that the additional cost burden associated with increased fees could cause development feasibility challenges and constrain new development.

The City is seeking updates to its in lieu parking, public safety, quality of life (parks, recreation, and cultural facilities), and traffic signal mitigation fees (with possible expansion to include pedestrian and bicycle facilities). The public safety, quality of life, and traffic signals fees all fall under the purview of the Mitigation Fee Act and require a Mitigation Fee Act nexus analysis. Typically, parking in-lieu fees fall under a distinct City category of ordinance-driven fees that combine City parking policy requirements with current parking costs to determine the in-lieu fee schedule. Each of the fee updates will be addressed in a comprehensive fee report.

The City is seeking a consultant who is able to work with the City on multiple aspects of fee development. These will include, but not be limited to, working with the different departments to identify needed capital improvements and associated costs; working with the City departments to identify any other funding sources or expected developer contributions (e.g. through the Development Agreements; and working with the City to identify the fair share apportionment of costs to new development. The consultant will also need to work with the City to determine the appropriate time period and set of growth forecasts to include in the technical analysis.

Ultimately, the City is seeking a consultant to work collaboratively with City to conduct technical work and help identify appropriate updates in the specified fees. Key objectives of the studies are as follows:

- **Legally defensible.** The fees must be developed and implemented in a fashion that complies with applicable state law, including meeting all applicable nexus requirements. The fees should be based on explicit growth and cost assumptions and sound nexus arguments that ensure the types of facilities and the costs of the facilities are directly attributable to benefiting land uses.
- **Financially effective.** The fees developed should provide sufficient means to help successfully fund the new required capital facilities.

- **Economically feasible.** The fees developed in this process should be set at a level that is politically and economically acceptable. This should include careful consideration of fees in peer cities as well as development feasibility considerations. Input from key stakeholders in the community may also be appropriate to ensure that the fees receive broad support and are consistently applied.
- **Ease of administration.** As a practical matter, a fee program should not create unnecessary burdens on either City staff and/or project applicants (e.g., developers or property owners) from an administrative perspective. For example, the scope of the fee (who pays and how much) should be relatively easy to determine and implement.

3. CONSULTANT TEAM AND KEY STAFF

The proposed project team, its members and organizational structure are described below. Resumes of key staff are included in **Appendix A**.

Economic & Planning Systems, Inc. (EPS)

EPS will serve as the lead consultant throughout the study, ensuring timely completion of project tasks and effective communication across all involved parties. 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 has four office locations in Berkeley, Los Angeles, Sacramento, and Denver. In addition to serving as the team lead, EPS will be responsible for preparing the AB 1600 Nexus Report that documents the technical calculations necessary for a legally defensible fee program. EPS will also lead key presentations and the stakeholder outreach process. Key EPS members and their roles are described below.

- **Teifion Rice-Evans**, Principal, will serve as the Principal-in-Charge and will oversee the overall analysis and report preparation. Mr. Rice-Evans has established and updated development impact fee programs and other public financing mechanisms for a broad range of cities in the San Francisco Bay Area, Central Valley, and Southern California. Mr. Rice-Evans will be available for public presentations.
- **Walter Kieser**, Senior Principal, will serve as Project Advisor and will provide input on strategic and policy matters based on his 30 years of experience development and implementing fee programs and his prior experience working in the City of Calistoga and other rural resort communities. Walter Kieser will be available for public presentations where appropriate.
- **Michael Nimon**, Senior Associate, will serve as the Project Manager and day-to-day point of contact for the City. He will provide technical support to Mr. Rice-Evans. Mr. Nimon has worked on fee studies in various jurisdictions and has sophisticated analytical and modeling skills.

The assigned EPS staff has significant experience and demonstrated success working with similar public sector clients in previous projects. We have elected to maintain a relatively small, focused team to ensure cohesiveness to the planning studies with staff that understand the overall project goals and deliverables. Each member of the team will be capable of anticipating and understanding the ramifications of various decisions as the studies progress. The project budget and schedule also benefit from our close-knit team because we are better equipped to target critical elements of the study that can accelerate the schedule within the project budget, as required.

W-Trans

W-Trans involvement will be determined early on in the process as the specific City needs and preferences in terms of transportation fee updates and analysis are determined.

W-Trans provides traffic engineering and transportation planning services that emphasize mobility within available resources and help transform streets to serve all potential users. W-Trans specializes in retrofitting streets and roads to make walking, bicycling and transit use safer and more convenient while also appropriately managing vehicle traffic.

W-Trans strength and focus are on balancing the technical needs and functionality of traffic with the desire of communities to create more livable streets and sustainable transportation systems. The firm specializes in traffic operation analyses, traffic collision reduction programs, transportation facilities design including traffic signal and roundabout design to downtown revitalization, streetscape planning effort and complete street projects. W-Trans is certified as a woman-owned business (DBE) by the California Department of Transportation. W-Trans has previously evaluated the three primary intersections in the City of Calistoga where Highways 29 and 128 intersect with each other as well as with Silverado Trail and Petrified Forest Road.

- **Dalene Whitlock PE, PTOE**, Principal, will lead W-Trans transportation-related fee efforts. Ms. Whitlock has expertise in a broad range of areas including traffic operation, safety analysis and transportation facility design as well as the various facets of transportation planning. She gained substantial experience in traffic operation through public agency positions and by providing staff services. Dalene is very detail-oriented, so she performs the quality control reviews on W-Trans products. She has served as an officer of the Western District of the Institute of Transportation Engineers (ITE), presiding over the 2007 meeting in Portland and recently completed a three-year term on the International Board of Directors.

4. OVERALL SCOPE OF WORK

This Work Program describes the tasks EPS team will undertake to complete a comprehensive review and update of a number of the City of Calistoga's (City) existing development impact fees, consistent with the provisions of the Mitigation Fee Act (Government Code Section 66000) and other relevant statutes. It also includes the conversion of the City's inclusionary housing requirements on ownership housing into an in-lieu fee as well as the update of the City's existing commercial linkage fees. Affordable housing fee technical analysis will be consistent with the recent court cases (*i.e.*, *Palmer*, *Patterson*) that have reshaped the landscape in which affordable housing fee programs. It is important to note that this comprehensive fee update includes three classes of fees from a legal standpoint, including: (1) development impact fees under the Mitigation Fee Act; (2) policy-based in-lieu fees under broader nexus requirements; and, (3) affordable housing linkage fees under State law and recent court cases.

Specifically, this work program includes the necessary technical work to support the adoption of updated/ new development fees as follows:

- Public safety facilities and equipment development impact fee
- Quality of life improvements (parks and recreation facilities) development impact fee
- Transportation development impact fee
- In-lieu affordable housing fee on residential development
- Affordable housing fee on non-residential development (commercial linkage fee).
- In-lieu parking fee

The Work Program also includes the evaluation of the potential economic effects of fee changes by comparing the potential, new fee schedule in the City of Calistoga with fees in other relevant cities and by considering the cost burden implications of any potential fee increases.

The Work Program is envisioned as a collaborative effort with City staff. EPS is the lead consultant and will be responsible for the preparing the overall technical report and the technical work on all fees except the transportation fee. W-Trans will lead the effort to update the transportation impact fee, including technical work and explanations at public meetings. EPS will integrate W-Trans technical work into the comprehensive fee report. This primary work program section includes a brief synopsis of the W-Trans work program with a fully detail transportation impact fee work program described in **Chapter 5**.

Task 1: Project Initiation

EPS and W-Trans will meet with City staff to discuss the approach and refine the proposed Work Program, Schedule, and Budget. In advance of the meeting, the Consultant will obtain and review relevant documents and data from the City, as well as identify additional information needs. Information sources may include the City's most up-to-date Capital Improvement Program (CIP), facility master plans, the General Plan, land use projections, bond measure documentation, and other relevant documents. For the affordable housing fees, the group will discuss the City's goals for the new and updated affordable housing fee programs, the history of the current Housing In-Lieu fee program, and the effects of recent court cases on the necessary technical analysis and adoption procedures for affordable housing fees.

As part of the project initiation meeting, it would be helpful to have key City staff in attendance to provide them with an overview of the project objectives, data requirements, and key issues of concern. For the affordable housing fees, in particular, it is recommended that EPS and City staff engage the City Attorney or other legal advisors at this time to gain their input and assure their comfort with the proposed approach.

Communication protocol, data requirements, and the schedule for project deliverables can be confirmed at this project initiation meeting. Following the project initiation meeting a revised Work Program will be prepared, if appropriate.

Task 2: Demographic and Land Use Analysis

EPS will work closely with City staff to assemble the land use assumptions, growth projections, and descriptions of “pipeline” projects. EPS will also define the operative assumptions, such as population and employment densities for each land use category to be used in estimating demand allocation for new infrastructure. W-Trans will also engage with EPS and City staff to ensure data relative to the future development potential in the City is reported in a manner that is also suitable for transportation impact development.

Task 3: Development Impact Fees

Task 3 covers the technical work required to update the public safety, quality of life, and parking in-lieu fees. This technical work will establish the maximum, justifiable fee level. The recommended fee may be less than the maximum based on considerations addressed in **Task 6**. The transportation impact fee and affordable housing fees require distinct technical approaches and are described in **Tasks 4** and **5** respectively.

Task 3.1: Facility Requirements and Costs

EPS will work with City staff to assemble the list of public facility and infrastructure requirements that will constitute the development impact fee improvement program for each of these fee categories. These individual improvement items will include those that are proposed to be funded all or in part by the different development impact fee. The Consultant Team will review all relevant City planning documents, including the City’s CIP, existing facility master plans, and bond documents. EPS will also engage the relevant City staff members to gain a comprehensive understanding of the current and future public facility needs. In certain instances, prior investments in improvements that provide capacity for new development can be included in the development impact fee program. Improvements will include public safety facilities (including police and fire protection facilities and equipment), quality of life improvements (including parks, recreation, and cultural facilities), and parking improvements/ costs.

EPS will review the appropriateness of the development impact fee improvement program from a nexus standpoint to identify any weaknesses that might represent potential legal challenges. Special attention will be paid to assure that cost estimates include all appropriate items, including land acquisition, design and engineering, construction, program administration, and other relevant costs.

Task 3.2: Cost Allocation and Fee Calculation

EPS will prepare the nexus-based cost allocation, necessary to develop a preliminary development impact fee schedule for review by City staff. As a part of this effort, the Consultant will first allocate the DIF Program costs to new and existing development. Specifically, the Consultant will review each capital project developed in **Task 3** 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 by each. The Consultant will pay special attention to ensure that facility needs and costs associated with existing deficiencies in service levels are not included in the proposed fees.

EPS will then allocate the development impact fee improvement program costs to the land use categories defined in **Task 2**. This allocation will be based on the relative contribution of each land use type to the demand for the related Improvement Program cost category. Based upon the cost allocation, EPS will prepare a preliminary fee schedule with the total costs attributable to the projected development of each land use type. 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. The sum total of the fees for each land use category would become the total AB 1600 fee burden for each land use. EPS will summarize the fees by improvement type and land use for the City's review.

Task 4: Transportation Impact Fee

W-Trans will develop a transportation impact fee (previously known as the "Traffic Signal Mitigation Fee") structure that is based on current data and that will allow the City to maintain acceptable operating conditions at primary intersections as well as provide adequate facilities for bicyclists, pedestrians and transit users. The transportation impact fee will be based on the future development forecasts in **Task 2**, future infrastructure improvements (from the General Plan and input from Public Works staff), and traffic modeling, as well as on consideration of future bicycle and pedestrian facilities. The detailed W-Trans scope of work is provided in **Chapter 5** and provides a more complete description of the proposed technical work.

Task 5: Affordable Housing Fees

Task 5 includes the technical work necessary to update the existing affordable housing fee on new non-residential development (Housing In-Lieu fee) and to establish an in-lieu fee for the City's inclusionary housing requirements. This technical work will establish the maximum, justifiable fee level. The recommended fee may be less than the maximum based on considerations addressed in **Task 6**.

Task 5.1: Funding Gap Calculations

The first step is to determine whether and how much subsidy is required to provide new housing units for worker households of various income levels (e.g., moderate, low, and very low). Determination of a required subsidy amount involves an estimation of the costs of development (construction, land, fees, required financial returns, etc.), as well as an estimation of the prices at which the units are affordable to income-qualified households. EPS will provide detailed initial assumptions and calculations to City staff for review and comment and make adjustments as appropriate. With assistance from the City to identify appropriate participants (for-profit and

nonprofit developers, etc.), EPS will conduct conversations with these stakeholders to review the assumptions and calculations on which the impact fees are based. Following these initial discussions and further consultation with City staff, EPS will make adjustments to the assumptions and calculations as appropriate. Based on calculations in this step, if the development costs are higher than the allowable prices, a subsidy or financing gap will be identified and quantified.

Task 5.2: Commercial Linkage Fee Estimation

EPS will update the City's current Housing In-Lieu Fee on nonresidential development. The nexus (i.e., linkage) between new nonresidential development and the demand for affordable housing will be derived by preparing employment density and compensation estimates of future employees for several nonresidential land use types (e.g., retail, office, industrial, tourist accommodations, etc.). New household formation resulting from new employment will be categorized by income category (moderate, low, very low) to estimate total demand. These calculations include consideration of local trends in household formation (e.g., size and location of household formation). The demand by land use category will be converted into a fee, on a per-building-square-foot basis, based on the affordability gap calculations derived in **Tasks 5.1**.

Task 5.3: Inclusionary Housing In-lieu Fee

The recent court cases have limited inclusionary housing requirements to ownership units. EPS will convert the City's current inclusionary housing requirements into an equivalent in-lieu fee. This fee will be derived from the City's current inclusionary standards and the affordability gap calculations in **Task 5.2**. It should be noted that additional court cases are under way that could alter the appropriate approach to inclusionary housing in-lieu fees.

Task 6: Feasibility Considerations and Fee Comparisons

EPS will work with the City to determine a recommended fee schedule that is consistent with the technical work provided from **Tasks 3** through **6**, but that also considers other City policy issues and the potential economic consequences of fee changes. EPS will conduct technical work to help inform the City on the potential economic implications of any justifiable fee increases. EPS will provide information on fees from other comparable and neighboring jurisdictions so the City can compare its current and potential, updated fee levels. EPS will also consider the potential effects of any increased fees on the feasibility of new development. Specifically, EPS will consider the collective effects of potential increases relative to development values and standard, supportable fee burden levels. Depending on the outcome of this analysis and discussions with City staff, EPS will recommend methods for making comparability and/or feasibility-related adjustments to the updated fees.

Task 7: Technical Reports

EPS and W-Trans will prepare technical reports. All updated/ new development fee calculations will be summarized in the Impact Fee Technical Report. W-Trans will prepare the transportation impact fee section of the technical report (and subsequent revisions). The technical report will document the assumptions and methodology and will establish the required nexus for the recommended fees. Subsequently, the EPS Team will prepare an administrative draft Public

Review Draft of the Final Impact Fee Report (5 hard copies and one electronic copy in PDF file). This report will include copies of all data, models, and other materials used in the analysis and satisfy the reporting requirements of the relevant statutes. The comments received from the City staff will be incorporated into the Public Review Draft of Final Impact Fee Report (25 hard copies and one electronic copy in PDF file). The report will reflect the analysis conducted to date, provide maximum fee recommendations for each fee program, and document key assumptions and technical approach.

Task 8: Meetings and Presentations

EPS will conduct briefings for key staff members at critical points in the update process. The scope reflects EPS participation in up to two (2) public meetings or presentations to stakeholders and to the City Council. The budget estimate provided herein also includes two sets of face-to-face meetings between EPS and City staff. The W-Trans budget estimate includes attendance by the W-Trans project manager at two public meetings. The project timeline and cost estimate are addressed in more detail in subsequent sections.

Task 9: Final Impact Fee Report

EPS will combine all input received to date to prepare a "Screen-check" copy of Final Impact Fee Report for staff review (2 hard copies and one electronic PDF file). The document will include an executive summary, overview of the update process, summary explanation of the fee methodology, a schedule of updated impact fees for each program, summary explanation and findings of the fee burden analysis, and an improvements database with costs included in each individual fee program. Once final input from the City staff is received, EPS will produce 25 hard copies and one electronic PDF file of the Final Impact Fee Report.

5. DETAILED W-TRANS SCOPE OF WORK

The following scope of services is suggested to achieve a Transportation Fee (previously known as the "Traffic Signal Mitigation Fee") structure that is based on current data and that will allow the City to maintain acceptable operating conditions at primary intersections as well as provide adequate facilities for bicyclists, pedestrians and transit users. W-Trans will revise its scope of work (and associated budget) depending on the precise traffic fees need of the City.

Because intersection operation can be more critical during the morning peak hour than during the evening peak hour at some intersections, and because some types of uses (such as offices) have higher trip generation rates during the morning than during the evening, it is suggested that the analysis cover both weekday peak periods. This approach also gives the City the information that is needed to establish the basis of the fee. Note that we are not recommending analysis of the weekend peak(s) because standard weekend trip generation rates are not available for many uses, so application of the fee would be more difficult. However, we believe that all the critical infrastructure needs will be identified with the proposed analysis of weekday conditions.

Project Initiation

1. A kick-off meeting will be held with City staff, at which time all information related to the existing fee structure will be obtained and reviewed so that appropriate sections can be retained. The project goals and objectives would also be discussed to ensure that the analysis performed and resulting product meet the City's needs.
2. W-Trans has previously evaluated the three primary intersections in the City where Highways 29 and 128 intersect with each other as well as with Silverado Trail and Petrified Forest Road, and we propose including up to five additional locations where arterials and/or collectors intersect and where operation should be monitored. Traffic count information is currently available for the three intersections noted above, but new turning movement counts will need to be obtained at any other intersections to be included. Additionally, we will collect daily volumes (machine counts) at up to five locations.

Fee Development

3. Data relative to the future development potential in the City of Calistoga will need to be obtained from the Planning Department, including the site location, land use type, and density or FAR. A database with parcel specific information assigned to Traffic Assignment Zones will be developed if sufficiently detailed information is available, allowing future updates to the analysis to be performed easily based on actual land uses and densities rather than projections.
4. Planned future infrastructure improvements will be obtained from the General Plan and discussed with Public Works staff to ensure that all known projects as well as their current feasibility are included.

5. Census data or other regional trip pattern information will be researched to develop appropriate distribution factors for both home-to-work and work-to-home trips. The home-to-work distribution will be used to assign trips to and from residential land uses while the work-to-home information will be applied to most commercial land uses except retail, where an average rate will be developed to reflect both the employee and customer trips.
6. An analysis model will be developed in TRAFFIX that includes all of the major arterial and collector streets and study intersections together with anticipated future roadways and intersections. The "model" will include nodes to load traffic onto the network where future development is anticipated, including some estimate of growth from outside the City's boundaries, as well as gates inside and outside the City for trip origin/destination. Volumes from appropriate countywide modeling will be obtained at screenline locations around the City for comparative purposes. Care will be taken to assigning trips internal to the City to avoid double-counting the trip by applying it both on the residential and commercial end.
7. Existing levels of service will be determined based on available or new count data and current intersection geometrics.
8. Collision records for the City will be reviewed for a period of five years to determine if there are any high-incidence locations that should be evaluated for potential improvements.
9. Any diversions of existing trips that would occur along proposed future through streets will be estimated.
10. Projected future operating conditions will be determined based on the currently planned improvements and anticipated development.
11. Recommendations will be developed for any additional infrastructure improvements needed to accommodate the planned growth in the City of Calistoga and surrounding environs and provide safe and acceptable operation for vehicular traffic.
12. The City's Bike Plan will be reviewed and any projects needed to achieve acceptable operating conditions for pedestrians, bicyclists and transit users identified.
13. Planning level cost estimates will be developed for all of the recommended improvements with assistance from City staff. Estimates previously developed for improvements at Lincoln Avenue/ Silverado Trail will be updated, if necessary. Deductions will be applied as appropriate to represent anticipated outside funding, such as grants or Caltrans-funded projects. If desired, a line item for unspecified alternative mode projects could be included, with the amount based on the mode-split or desired future mode split.
14. An impact fee structure based on daily and/or peak hour trips will be developed that would provide adequate monies to fund all of the mitigation measures.

Reports

15. A section of the *Impact Fee Technical Report* addressing the Traffic Impact Fee will be prepared that details all of the data collected, assumptions applied, procedures followed, results and recommendations, with appropriate tables, figures and appendices.
16. Comments on the technical report will be addressed and the section updated for inclusion in the Administrative draft version of the *Public Review Draft of Final Impact Fee Report* submitted for staff review.
17. Subsequent to incorporation of changes to address staff comments, the report section for the *Public Review Draft of Final Impact Fee Report* will be produced.

Hearings

18. The project manager will be available to attend one community/stakeholder meeting and one City Council meeting.

6. *ROLE OF CITY STAFF*

EPS envisions a collaborative process with City staff to develop the technical inputs required to conduct the updated fee studies and to develop the appropriate policy recommendations concerning the fee program based on the technical analysis. Specific efforts where City involvement will be important will include, but not be limited to, the following:

- **Growth Forecasts.** EPS will work closely with City staff to determine the appropriate growth forecast and time period to use as the basis of evaluating capital facilities demand and determining the fees. Based on available information and best practices for fee establishment, EPS will recommend an approach and seek City staff approval.
- **Capital Improvement Program.** EPS will work with the City's fee program project manager and relevant City Departments to develop a list of capital improvements required in the City under the relevant fee categories (quality of life, public safety, traffic mitigation, and parking capital facilities). EPS and City staff will work collaboratively to develop the list, ensure the list includes only projects permissible under the Mitigation Fee Act/ other relevant statute, and to determine cost estimates.
- **Recommended Fee Schedule and Cost Burden Analysis.** EPS will develop estimates of the maximum potential fee schedule under appropriate legal statutes and requirements. EPS will also conduct fee comparisons with peer jurisdictions as well as cost burden feasibility analysis to test the ability of new development to accommodate fee increases. Based on these analyses, EPS and City staff will discuss the appropriate, recommended fee levels; specifically whether the recommended fees should be below the maximum potential fees and by how much.
- **Meetings and Coordination.** It is assumed that City staff will coordinate the necessary meetings between EPS staff and City staff as well as the public meetings and presentations.

7. PROJECT SCHEDULE

The proposed schedule by task is illustrated in **Table 1**. We are suggesting an efficient sequencing of tasks and frequent EPS to City staff communication. We aim to complete the Administrative Draft Report within twelve weeks of project authorization and the complete project within an additional six weeks for a total study completion timeline of 18 weeks. We are open to refining the timeframe based on your needs.

Table 1 Proposed Schedule

Task/ Description	Week																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Task 1: Project Initiation																		
Task 2: Demographic and Land Use Analysis																		
Task 3: Development Impact Fee Analysis																		
Task 4: Transportation Impact Fee																		
Task 5: Affordable Housing Fees																		
Task 6: Development Feasibility/ Fee Comparisons																		
Task 6: Technical Reports												AD		PRD				
Task 7: Meetings and Presentations	M			M					M					PP		PP		
Task 8: Final Impact Fee Report																		FD

M = meeting with City staff
 PP = Public Presentations (City Council / Commission presentations)
 AD = administrative draft of final impact fee report
 PRD = public review draft of final impact fee report
 FD = final impact fee report

8. *EPS RELATED EXPERIENCE AND REFERENCES*

This chapter describes EPS and our extensive experience in public finance studies including development impact fees throughout California. This chapter introduces the firm, describes the development impact fee services we provide, and provides selected recent and relevant project experience.

About 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 government services and public infrastructure, land use and conservation planning, and government organization. EPS's areas of expertise include:

- Regional Economics and Industry Analysis
- Fiscal and Economic Impact Analysis
- Real Estate Market and Feasibility Analysis
- Public Finance
- Reuse, Revitalization, and Redevelopment
- Real Estate Transactions and Negotiations
- Land Use Planning and Growth Management
- Open Space and Resource Conservation
- Government Organization
- Transportation Planning and Analysis
- Asset Valuation and Repositioning

Since 1983 EPS has provided consulting services to hundreds of public and private sector clients in California and throughout the United States. Clients include cities, counties, special districts, 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, government organization, and computer applications. 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.

Development Impact Fee Services

As part of its broader public finance practice, EPS prepares development impact fee studies and programs for cities, counties, special districts, and private sector clients. EPS's impact fee-related products and services range from single-purpose fees focused on particular facilities or sub-areas to more comprehensive, multi-improvement programs spanning entire cities or numerous jurisdictions. In addition, EPS provides evaluation and updates to existing fee programs to reflect changing conditions and assists clients with related administrative and implementation efforts.

EPS's approach to development impact fee programs is based on a firm grasp of statutory requirements and legal considerations, broader public financing issues and options, and economic conditions and limitations as well as administrative and institutional considerations.

EPS combines sound technical analysis grounded in legally defensible nexus arguments with analysis of economic implications, consideration of the concerns of various stakeholders, and policy direction from the client (e.g., public agency staff and elected officials) in completion of its fee program assignments. We endeavor to ensure that our analytical process clearly distinguishes between policy issues and technical analysis, and deliverables are clear and well documented. Specific services provided within the broader realm of development impact fee studies are discussed below.

- **Nexus Analysis and Technical Reports**—EPS prepares the technical analysis and findings that establish the rational nexus between proposed fee levels and the impact of development to ensure that fee programs are fair and legally defensible, pursuant to the requirements of State law (e.g., AB 1600 in California). This analysis is generally documented in a technical report that is incorporated as part of enabling resolutions and ordinances.
- **Development Forecasts and Facility Need Assessment**—EPS provides detailed land use and development forecasts and assesses the impact of this growth on the need for new public improvements, based on public service standards, existing service levels, and other factors. In addition, EPS works with jurisdictions to organize and refine their capital improvement programs to ensure that facilities are appropriately characterized and defined.
- **Economic and Financial Feasibility Considerations**—To be effective, fee programs must provide sufficient means to successfully fund the capital facilities and improvements identified given the range of financial resources available and economic conditions. Consequently, EPS provides a variety of services and analysis to ensure that fee programs are effectively integrated with other financing mechanisms and incorporate features such as credit and reimbursement agreements and special tax bond issues. In addition, EPS evaluates the economic implications of the fee programs to ensure that financial burdens on development are reasonable and do not stymie growth.
- **Implementation and Ordinance Preparation**—Once a fee study is complete, EPS provides a variety of services to ensure that the corresponding program can be approved and successfully implemented over time. For example, EPS often assists legal staff in drafting resolutions to legalize the fee and helps to develop procedures and requirements for collecting and distributing fee revenues. Effective implementation efforts are especially important in the context of multi-jurisdictional fee programs in which a variety of agreements and institutional mechanisms are often required to gain agreement among participating entities.
- **Development Fee Program Review**—Development impact fee programs are continuously affected by changing circumstances including new facility requirements, market conditions and development trends, changing land use policies, and availability of other funding mechanisms. Moreover, statutory requirements include the need for regular review and updates to meet new circumstances. EPS conducts reviews of existing development impact fee programs to determine what revisions, given these changing circumstances, are necessary to achieve or adjust the original program objectives.
- **Special Purpose Development Impact and In-Lieu Fees**—Special purpose impact fees are applied for items that do not fall into the traditional category of “infrastructure” and may even be adopted under the jurisdiction’s police power rather than the statutes governing

infrastructure development impact fees. Key examples of such fees are fees “in lieu” of meeting a zoning ordinance requirement for inclusionary housing or parking. Similar fees may also be charged for meeting open space, agricultural preservation, or habitat conservation purposes. EPS is often involved in the formulation of the specific policy and zoning requirements with the in-lieu fee being an option for meeting the policy requirements.

Relevant Project Experience

Below is a list of representative development impact fee projects that EPS has completed in the past few years. We have included this wide array of projects to demonstrate the firm’s broad experience with development impact fee nexus studies.

Comprehensive Development Impact Fee Programs

- Santa Rosa Capital Facilities Fee, *Santa Rosa, California*
- Fairfield Capital Facility Fee, *Fairfield, California*
- Antioch Development Impact Fee Update
- Citywide Capital Facilities Fee Nexus Study, *Turlock, California*
- Newark Public Facilities Impact Fee Study, *Newark, California*
- Madera Public Facilities Impact Fee Study, *Madera, California*
- Union City Capital Facilities Program and Fee, *Union City, California*
- Alameda Capital Facilities Fee Program, *Alameda, California*
- Burbank Citywide Road, Park, and Public Facilities Nexus Study, *Burbank, California*

Facility-Specific Development Impact Fee Programs

- South San Francisco Public Safety Fee, *California*
- City of Santa Monica Parks and Recreation Fee, *California*
- Redwood City, Parkland and Facilities Fee, *Redwood City, California*
- Sacramento City Park Nexus Study and Updates, *Sacramento, California*
- Cameron Park CSD Park and Recreation and Fire Facilities Plans and Nexus Studies and Updates, *El Dorado County, California*
- Martinez Road and Parks Impact Fee Study, *Martinez, California*
- Turlock Park Fee Nexus Study, *Turlock, California*
- Santa Rosa Recreation and Needs Assessment Study, *Santa Rosa, California*
- Union City Parkland Fee, *Union City, California*
- Fresno Major Street Impact Fee Nexus Study, *Fresno, California*
- Grass Valley Traffic Impact Fee Program Nexus Study, *Grass Valley, California*
- San Joaquin County Fire Protection Fee, *San Joaquin County, California*
- El Dorado Hills CSD Park Fee Update, *El Dorado County, California*
- Levee Fee Protection Fee Program; prepared for Sacramento Area Flood Control Agency, *Sacramento County, California*

- West Sacramento Flood Control Fee Program, *West Sacramento, California*
- Loomis Fire Protection Nexus Study, *Loomis, California*

Selected Project Profiles

This section presents summaries of three (3) projects completed by EPS within the last five to eight years which demonstrate EPS's experience in preparing nexus studies for public facilities and improvements, including parks and recreation impact fee nexus studies.

Fairfield Capital Facilities Fee Program

Fairfield, California

EPS conducted the original 1995 nexus study to support the City of Fairfield's initial development impact fee program. EPS developed a comprehensive impact fee model that established the overall capital facilities needs, costs, and appropriate allocations between new and existing development and between the different land uses. Major improvement categories in the fee program include traffic improvements, parks and recreation improvements, and public safety and City Hall improvements. EPS prepared a nexus study that made clear nexus findings as required by the Mitigation Fee Act, established clear maximum fee levels, and worked with City staff and counsel to adjust the fee for particular policy areas (e.g., affordable housing and economic development) and in drafting the fee ordinance and resolution. EPS worked with a transportation subconsultant to develop the appropriate allocation factors for traffic improvements.

In 2002 and 2006, EPS was hired to review the City's efforts to update the fee program, examining fee levels, covered projects and their costs, the linkage between the fees imposed and the projects included in the program, and the administration of the program. EPS also worked with City staff to explain the updates to stakeholder groups. In 2011, EPS was again hired to update the citywide fees for traffic improvements and parks and recreation improvements in light of the changing real estate conditions as well as the need to ensure necessary infrastructure was provided. This fee update process is drawing to a close with City Council hearing set for April, 2013 and also includes the development of an area-specific development impact fee primarily for additional traffic improvements required to serve the City's northeast area of the City, its primary future growth area.

Contact Person: Erin Beavers, Director
Community Development Department
City of Fairfield
(707) 428-7461
EBEAVERS@fairfield.ca.gov

South San Francisco Public Safety Fee Nexus Study

South San Francisco, California

The City of South San Francisco was interested in considering a public safety development impact fee to fund its public safety equipment and infrastructure. The fee was envisioned to protect the City's General Fund from the increasing Police and Fire Department costs that included the acquisition and maintenance of department vehicles, apparatus, equipment, and similar needs for the provision of public safety services.

EPS provided both technical and organizational support in the adoption of the public safety fee for police and fire capital facilities. Working with the City, EPS established a nexus study based on the City's economic and demographic growth forecasts, the specific Police and Fire Department capital needs, public policy goals, and the applicable legal requirements. As part of the work, EPS carefully distinguished costs that can be included in a development impact fee and those that must be funded through other mechanisms based on the Mitigation Fee Act. The public safety fee was adopted by the South San Francisco City Council in December 2012.

Contact Person: Philip White, Fire Chief
City of South San Francisco
(650) 829-3950
phil.white@ssf.net

Redwood City Parks Development Impact Fee Program

City of Redwood City, California

Redwood City is a mid-sized municipality in the San Francisco Bay Peninsula region with a limited supply of vacant land. In 2005, a Parks and Recreation Department study showed that the City was serving residents with 3 acres of active park land per 1,000 City residents. As part of the City's effort to update its General Plan, the Department retained EPS to prepare a fee study which would require future developments to maintain this level of service through in-lieu fees and/or park dedications. EPS, in conjunction with the staff, prepared estimates for park facilities and used existing data on land values and demographic trends to estimate land costs and unit densities for future development. EPS then prepared a report satisfying the nexus requirements under AB 1600 and the Quimby Act which documented the maximum fee the City could charge new units.

Contact Person: Gary Hover, Former Superintendent for the City of Redwood City Parks,
Recreation, and Community Services
Currently with Verde Design
2455 The Alameda, Suite 200
T 408.985.7200
gary@verdedesigninc.com

9. *W-TRANS RELATED EXPERIENCE AND REFERENCES*

About Us

W-Trans provides traffic engineering and transportation planning services that emphasize mobility within available resources and help transform streets to serve all potential users. We are particularly skilled in retrofitting streets and roads to make walking, bicycling and transit use safer and more convenient while also appropriately managing vehicle traffic.

Our strength and focus are on balancing the technical needs and functionality of traffic with the desire of communities to create more livable streets and sustainable transportation systems.

Our staff have applied their skills to a variety of projects ranging from traffic operation analyses, traffic collision reduction programs, transportation facilities design including traffic signal and roundabout design to downtown revitalization, streetscape planning effort and complete street projects. We take a holistic approach to traffic engineering, realizing that solutions cannot be developed in a vacuum or strictly follow the standards of the past. Traffic analysis and design must be sensitive to the context of the surrounding land use and community goals to be successful. W-Trans service areas include:

- Complete Streets
- Traffic Impacts
- Pedestrian Safety and Design
- Bicycle Facilities
- Traffic Engineering Design
- Roundabouts
- Traffic Operations
- Municipal Staff Services
- Traffic Safety
- Traffic Calming
- Parking
- Transit

Firm History

W-Trans was established in 1995 by Dalene Whitlock and Steve Weinberger; Zack Matley became an owner in 2006. In 2005, W-Trans moved into its current office location in downtown Santa Rosa and opened its Oakland office in 2011 with Mark Spencer as the Branch Manager. The technical staff includes seven engineers who are registered in Traffic and/or Civil Engineering in California: Dalene J. Whitlock, Steve Weinberger, Allan Tilton, Mary Jo Yung, Mark Spencer, Tony Henderson and Jaspreet Anand. Zack Matley is registered as a certified planner by the AICP. Additional staff includes three technical and five administrative employees

Disadvantaged Business Enterprise (DBE)

W-Trans is certified as a woman-owned business (DBE) by the California Department of Transportation. A copy of our certification can be provided upon request.

Contact Information

Whitlock & Weinberger Transportation, Inc.

Website: www.w-trans.com

490 Mendocino Avenue, Suite 201
Santa Rosa, CA 95401
voice (707) 542-9500
fax: (707) 542-9590

475 14th Street, Suite 290
Oakland, CA 94612
voice (510) 444-2600

Relevant Experience

Traffic Impact Fee Update (Town of Windsor) – The Town of Windsor’s traffic impact mitigation fee was increased annually to reflect inflation over a period of more than 15 years, but a complete update was required to ensure that the Town’s infrastructure needs and the basis for the fee were relevant to the current conditions. The work effort included creating a Townwide model, establishing a database of development potential, estimating travel patterns, identifying future deficiencies, determining the infrastructure improvements needed to achieve acceptable operation, defining costs, and calculating the fee for various land uses. The fee as initially presented to the Town Council was modified to reflect a lower local share of major interchange projects before its acceptance and adoption.

Contact: Richard Burtt, Town Engineer, (707) 838-5343, rburtt@townofwindsor.com

Napa Countywide Bicycle Plan Update (County of Napa) – The Napa Countywide Bicycle Plan Update completed in the Fall of 2011 provides the framework for improving the bicycle transportation system throughout Napa County and its communities. This Countywide Bicycle Plan Update and its project proposals are intended to be incorporated into the NCTPA’s Strategic Transportation Plan, the Regional Bicycle Plan for the San Francisco Bay Area, and MTC’s Regional Transportation Improvement Program. Questa Engineering prepared the mapping for the project using the County’s GIS database.

Contact: Eliot Hurwitz, Napa County Transportation & Planning Agency, (707) 259-8782, ehurwitz@nctpa.net

Enchanted Resorts EIR Transportation Section (City of Calistoga) – The Enchanted Resorts project includes cottage guest rooms as well as club residences and individual residences supported by a restaurant, event facilities, and wine cave. W-Trans prepared the Transportation Section of the Draft EIR, which addresses typical issues such as intersection and roadway segment level of service, but also deals with pedestrian, bicycle, transit, and emergency vehicle access to this hilly site served by a single roadway with some steep grades and sharp curves. Based on an AutoTURN analysis and through communications with the City’s Fire Chief, recommendations were developed for brush trimming and roadway modifications to ensure that the City’s largest fire truck could negotiate the access roadway as well as the EVA.

Contact: Erik Lundgren, Associate Planner, (707) 942-2827, elundquist@ci.calistoga.ca.us

10. PROJECT BUDGET

The cost estimate of the EPS team by task is outlined in **Table 2**. The total budget estimate for the work program is **\$103,100**. This includes an EPS budget of **\$67,920** and a W-Trans budget of **\$35,180**. A more detailed description of the W-Trans budget is provided in **Table 3**. This covers all costs associated with the tasks and materials described in the EPS Scope of Work, including the meetings/presentations identified. This budget assumes that City staff provides the assistance and information outlined in the Scope of Work. Charges for consultant time are based on the amount of time actually spent. Invoices are submitted monthly and payable upon receipt.

Table 2 Proposed Overall Budget

Task/ Description	Rice-Evans Principal	Kieser Sr. Principal	Nimon Sr. Assoc.	Research Analyst	Prod. Staff	EPS Staff Cost Subtotal	EPS Direct Costs	EPS Total	W-Trans Total (4)	Grand Total
Task 1: Project Initiation (1)	8	6	8	0	0	\$5,120	\$125	\$5,245	\$3,998	\$9,243
Task 2: Demographic and Land Use Analysis	6	2	12	6	0	\$4,740	\$80	\$4,820	\$0	\$4,820
Task 3: Development Impact Fee Analysis (2)	26	8	30	18	0	\$15,830	\$200	\$16,030	\$0	\$16,030
Task 4: Transportation Impact Fee	4	0	0	0	0	\$1,000	\$10	\$1,010	\$21,570	\$22,580
Task 5: Affordable Housing Fees	20	8	30	20	0	\$14,550	\$100	\$14,650	\$0	\$14,650
Task 5: Feasibility Considerations/ Fee Comparisons	8	4	18	10	0	\$7,270	\$80	\$7,350	\$0	\$7,350
Task 6: Technical Reports	12	4	30	8	20	\$11,530	\$100	\$11,630	\$6,000	\$17,630
Task 7: Meetings and Presentations (3)	8	8	0	0	0	\$4,400	\$150	\$4,550	\$2,807	\$7,357
Task 8: Final Impact Fee Report	<u>4</u>	<u>2</u>	<u>4</u>	<u>0</u>	<u>4</u>	<u>\$2,560</u>	<u>\$75</u>	\$2,635	\$805	\$3,440
TOTAL HOURS	96	42	132	62	24					
Billing Rates	\$250	\$300	\$165	\$110	\$75					
TOTAL PROJECT COSTS						<u>\$67,000</u>	<u>\$920</u>	<u>\$67,920</u>	<u>\$35,180</u>	<u>\$103,100</u>

*Note: the budget includes a total of 5 meetings.

(1) Includes one kick-off meeting with City staff attended by EPS and W-Trans.

(2) Includes two half-day meetings with Department staff attended by EPS.

(3) Includes attendance at two public presentations by EPS and W-Trans staff.

(4) Detailed W-Trans budget on subsequent page.

Table 3. W-Trans Fee Budget

Transportation Fee Development W-Trans Fee Estimate

<i>HOURS BY STAFF MEMBER</i>								
<i>Task</i>	<i>Dalene Whitlock</i>	<i>Allan Tilton</i>	<i>Zack Matley</i>	<i>Tony Henderson</i>	<i>Sam Lam</i>	<i>Tech/ Admin</i>	<i>Misc</i>	<i>Total Hours</i>
Project Initiation	7	0	0	0	0	6	\$2,048	13
Fee Development	32	7	12	48	37	33	\$0	169
Reports	12	0	5	9	5	25	\$0	56
Hearings	12	0	0	0	0	2	\$127	14
	63	7	17	57	42	66	\$2,175	252

<i>FEE AT HOURLY RATES INDICATED</i>								
<i>Task</i>	<i>\$210</i>	<i>\$170</i>	<i>\$150</i>	<i>\$115</i>	<i>\$100</i>	<i>\$80</i>	<i>LS</i>	<i>TOTAL</i>
Project Initiation	\$1,470	\$0	\$0	\$0	\$0	\$480	\$2,048	\$3,998
Fee Development	\$6,720	\$1,190	\$1,800	\$5,520	\$3,700	\$2,640	\$0	\$21,570
Reports	\$2,520	\$0	\$750	\$1,035	\$500	\$2,000	\$0	\$6,805
Hearings	\$2,520	\$0	\$0	\$0	\$0	\$160	\$127	\$2,807
	\$13,230	\$1,190	\$2,550	\$6,555	\$4,200	\$5,280	\$2,175	\$35,180

11. AVAILABILITY

The following roster lists key personnel that will be assigned to perform duties of services under this contract, duration of time with the firm, and their anticipated percentage of time to be available for work associated with this Project. Additional information, including relevant experience, education, and professional licenses is described in resumes included in **Appendix A**.

Economic & Planning Systems, Inc. (EPS)

- **Teifion Rice-Evans (EPS)**, Principal, has been with EPS for over 19 years. Teifion has extensive experience working on development impact fee projects. He will be available to spend up to 25 percent of his overall availability on the Project during the term of the contract.
- **Walter Kieser (EPS)**, Senior Principal, founded EPS 30 years ago. Walter has been at the forefront of development impact fee practice in California since the passage of the Mitigation Fee Act in the late 1980's. He will be available to spend up to 10 percent of his overall availability on the Project during the term of the contract.
- **Michael Nimon (EPS)**, Senior Associate, has been with EPS for 7 years. He will be available to spend up to 30 percent of his overall availability on the Project during the term of the contract.

W-Trans

- **Dalene Whitlock PE, PTOE, (W-Trans)**, Principal, a founding partner of W-Trans and has been with the firm since 1995. Dalene will be available to spend 25 percent of her overall availability on the Project during the term of the contract.

12. CITY'S CONSULTANT CONTRACT

Proposer accepts the form of the agreement with the City.



APPENDIX A:
Staff Resumes



Economic & Planning Systems, Inc.
2501 Ninth Street, Suite 200
Berkeley, CA 94710-2257
510 841 9190 tel
510 841 9208 fax

Berkeley
Denver
Los Angeles
Sacramento

www.epsys.com

TEIFION RICE-EVANS, PRINCIPAL

Teifion Rice-Evans is a land use economist with over 19 years of experience. He manages complex consulting assignments in the areas of public finance, real estate economics, growth management, and conservation economics. He is one of the firm's leading experts in nexus studies and, development impact fees.

SELECTED PROJECT EXPERIENCE

City of Fairfield Development Impact Fee Studies

EPS prepared citywide development impact fees and area development impact fees for a broad range of capital facilities in the City of Fairfield. Nexus studies and updates were conducted in 2001/2002, 2005/2006, and most recently 2012/2013. Development impact fees were developed to help fund police, fire, parks and recreation, transportation, and other capital facilities. EPS also recently conducted an extensive evaluation of the effects of increases in fees on development feasibility.

City of South San Francisco

EPS prepared a Public Safety Capital Facilities fee for the City of South San Francisco. The fee covered a broad range of public safety capital improvements, including facilities, equipment, vehicles and associated replacement costs. The technical analysis and fee adoption were required to occur in a two-month timeframe and the fee was adopted by the City in December 2012.

City of Union City Development Impact Fees

EPS prepared citywide development impact fees and periodic updates for the City of Union City over the last decade. EPS also developed an area-specific development impact fee for a redevelopment area including the Multi-Model Transit Station. The impact fees are currently funding transit, transportation, parks and recreation, and other improvements.

City of Redwood City Park Fees

EPS updated the City of Redwood City's park development impact fee schedule. The updated fee program included a combination of Quimby Act park fees as well as Mitigation Fee Act development impact fees.

City of Santa Monica Parks and Recreation Fees

EPS is currently worked with the City of Santa Monica to develop a comprehensive parks, recreation, and cultural facilities fee. The fee schedule includes fees on residential, commercial, and visitor-serving uses and will help fund a broad array of facilities.

City of Antioch Development Impact Fee Study

EPS prepared a citywide development impact fee nexus study for the City of Antioch. The nexus study included fees for park and recreation facilities, parkland, police and fire, and public works facilities.

EDUCATION

Master of Arts in Economics,
University of Cambridge,
1995

Bachelor of Arts in Economics,
University of Cambridge,
1992

LECTURES

Association of University Related Research Parks,
2011: Developing Communities of Innovation

Northern California Conservation Partners Conference, 2007: Challenges to Conservation Financing

California League of Cities, 2005: Parks and Open Space Financing

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

California State University, 2001: Economic Impacts of Parks

AWARDS

Association of Environmental Professionals 2009 – Award for Outstanding Resource Document – *East Contra Costa County HCP/ NCCP*

California American Planning Association 2010 – California Central Coast Division – *Paso Robles Purple Belt*

WALTER F. KIESER, SENIOR PRINCIPAL

Walter Kieser, founder and Senior Principal of EPS, is a land use planner and urban economist. During his 40-year professional career, Mr. Kieser has specialized in managing complex land use planning and conservation projects, evaluating local government reorganizations, preparing economic and financial feasibility analyses and implementation programs, and facilitating large-scale real estate transactions. This broad-based expertise has provided balanced and pragmatic solutions, ensuring that land use, conservation, reorganization, and facility master plans can be successfully implemented; that infrastructure and government services can be adequately created and sustained; and that real estate projects can meet private-sector financial objectives while supporting public policy objectives.

EXPERTISE

Public Finance

Prepared numerous public financing strategies and plans for a wide variety of public services and infrastructure projects, including development project-related infrastructure, area-wide capital improvement programs, open space and conservation projects, as well as specific infrastructure projects. Financing techniques applied have included formulation of area-specific and facility-specific development impact fees, special tax bonds, and redevelopment tax increment financing.

Fiscal and Economic Impact Analysis

Prepared detailed fiscal and economic impact analyses on a wide variety of land use plans, development projects, government reorganization proposals, taxation and budget policy determinations, infrastructure projects, and initiative ballot measures. These quantitative analyses have focused on determining potential fiscal and financial impacts, identifying the costs of growth, and ensuring successful implementation of public policy objectives.

Urban and Regional Planning

Participated in preparing numerous comprehensive and specific plans for cities and counties, with emphasis on demographic and economic forecasts, real estate market analyses, GIS-based spatial analyses, and policies and programs related to growth management, transportation, urban revitalization, recreation and open space, public services and infrastructure, and affordable housing.

Economic Development and Revitalization

Assisted cities and resort communities with preparing economic development and revitalization strategies associated with downtown business areas, visitor-serving resort development, and retail shopping centers. These strategies have involved the use of traditional redevelopment techniques, public-private partnerships, and implementation of transit-oriented, mixed-use development.

Resource Conservation

Participated in numerous programs and projects designed to preserve open space and natural habitats, preserve agricultural lands, and ensure productive and sustainable use of natural resources. These programs applied creative regulatory mechanisms (planning and zoning), compensatory regulations, and public acquisition techniques.

EDUCATION

Bachelor of Arts degree in Environmental Studies and Biology from Sonoma State University (SSU) in 1974

Graduate studies in economics and public administration at SSU and the University of California, Berkeley

PREVIOUS EMPLOYMENT

Associate, Angus McDonald and Associates, 1977-1983

Associate Planner, Sonoma County Planning Department, Advanced Planning Division, 1971-1976

U.S. Army Military Intelligence, 1967-1970

AFFILIATIONS

American Planning Association, Member

California Association of Local Agency Formation Commissions, Associate Member

The Economics of Land Use



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Government Organization

Prepared many governance feasibility studies addressing municipal incorporation, major annexations, special district formations and consolidations, and intergovernmental agreements. These feasibility studies typically involved preparing detailed pro forma operational and capital budgets as well as analyzing reorganization's impacts upon existing agencies.

Negotiated Agreements

Managed and participated in numerous real estate developments, infrastructure financing, and intergovernmental negotiations involving public and private participants. These negotiations have resulted in successful agreements, including mitigation and tax-sharing agreements, intergovernmental agreements, development agreements, owner participation agreements, and real estate disposition agreements.

MICHAEL NIMON, SENIOR ASSOCIATE

Michael Nimon is a land-use economist and has been with EPS since 2006. He has professional experience in the areas of infrastructure financing, financial feasibility, fiscal impact, economic, and market analysis studies, major site reuse, negotiations support, as well as prior experience in commercial real estate and financial modeling.

SELECTED PROJECT EXPERIENCE

Public Safety Nexus Fee Study, South San Francisco, CA

Project manager for the public safety fee for police and fire capital facilities study. The study provided technical and organizational support to establish the nexus for public safety costs based on the City's economic and demographic growth forecasts, the specific police and fire department capital needs, public policy goals, and the applicable legal requirements.

Development Impact Fee Nexus Study, Antioch, CA

Prepared a citywide development impact fee for the City of Antioch to cover a complete range of infrastructure and capital facilities. Different fees were developed for different land uses to fund critical public investments, including general government, public works, police, and parks.

Westside Infill Market Review and Feasibility Analysis, Chula Vista, CA

Project manager for the impact fee study evaluating a means to stimulate new development and feasibility implications of fee policy on various development types. Developed a financial model for analyzing feasibility of different development types and densities in the context of setting fee levels that would not adversely effect new development in the City.

Fairfield Capital Facilities Fee Program, Fairfield, CA

Participated in the citywide fee update study along with establishing an area development impact fee for the City's primary new growth area. The work included an update the citywide fees for traffic improvements and parks and recreation improvements in light of the changing real estate conditions as well as the need to ensure necessary infrastructure.

Hillcrest Transit Station Area Infrastructure Financing Plan, Antioch, CA

Participated in the real estate services provided to the Treasure Island Development Authority and the City of San Francisco. Services included financial and market analysis of waterfront redevelopment, evaluation of infrastructure financing for the Treasure Island reuse plan, pro forma cash flow and fiscal impact analyses, and negotiations support.

EDUCATION

Master of Urban and Regional Planning, San Jose State University (2011)

Bachelor of Science in Management Science (Economics and Finance), University of California, San Diego (2005)

PREVIOUS EMPLOYMENT

Associate, Grubb & Ellis (2005-2006)

Intern, San Diego Regional Economic Development Corporation (2005)

COMMUNITY WORK

Board of Directors Member, Diablo Hills Home Owners Association, 2010-2014 term

The Economics of Land Use



*Economic & Planning Systems, Inc.
2501 Ninth Street, Suite 200
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www.epsys.com

Dalene J. Whitlock, PE, PTOE

Principal



Education

BS in Civil Engineering, *San Diego State University, 1981*
BA in Physical Science, *Westmont College, Santa Barbara, 1981*

Affiliations/Activities

Institute of Transportation Engineers (ITE), *Fellow, Western District President 2006-2007, International Director 2010-2012*
ITE North Bay Transportation Forum, *Past Chairman*
Women's Transportation Seminar, *Member*
American Society of Civil Engineers (ASCE), *Member*
Traffic Engineer Registration Testing, *Test Preparation Participant*

Registration

Professional Engineer in California:
Civil Engineer – *Certificate No. 38942*
Traffic Engineer – *Certificate No. 1552*
Professional Traffic Operations
Engineer – *Certificate No. 343*

Professional History

1995 – Present W-Trans
(Principal/Owner)
1992 – 1994 TJKM Transportation
Consultants
1987 – 1992 City of Santa Rosa
1986 – 1987 County of Marin
1981 – 1986 Bechtel Power
Corporation,
San Francisco

Background

Ms. Whitlock has expertise in a broad range of areas including traffic operation, safety analysis and transportation facility design as well as the various facets of transportation planning. She gained substantial experience in traffic operation through public agency positions and by providing staff services. Dalene is very detail-oriented, so she performs the quality control reviews on W-Trans products. She has served as an officer of the Western District of the Institute of Transportation Engineers (ITE), presiding over the 2007 meeting in Portland and recently completed a three-year term on the International Board of Direction.

Representative Projects

Project Management

- *East Bay Municipal Utility District (EBMUD) – West of Hills Northern Pipeline Installation Project*
- *Bay Area Rapid Transit (BART) – Traffic Control Plans*

Traffic Safety

- *Rohnert Park – Snyder Lane Pedestrian Safety Study*
- *Petaluma – Protected-Permitted Left-turn Phasing Evaluation and Design*

Bicycles and Pedestrians

- *Marin County – Signal Modifications for Bicycle Detection*
- *Windsor – Public Bicycle Guide Map*

Traffic Operation

- *Mill Valley – Engineering and Traffic Surveys*
- *Marin County – San Domenico Expansion Traffic Impact Study*

Traffic Engineering Design

- *Rohnert Park – Rohnert Park Expressway/Rancho Verde Circle Signal Design*
- *American Canyon – Devlin Road and Napa Junction Road Extension Conceptual Layout*

Municipal Staff Services

- *Windsor – Traffic Impact Fee Update*
- *Novato – On-call Traffic Engineering Services*

Complete Streets

- *Lake County – Highway 20 Traffic Calming and Beautification Plan*
- *San Rafael – Point San Pedro Road Median Landscaping Design*

Traffic Impacts

- *Calistoga – Enchanted Resorts EIR*
- *Windsor – Windsor Unified School District EIR*

Expert Witness

- *Santa Rosa – Rowe vs. City of Santa Rosa*
- *Fresno – Garvey vs. City of Fresno*

Parking

- *Marin County – Wellness Campus Traffic and Parking Study*
- *Santa Rosa – Coddington Target Initial Study*