



City of Deltona

Comprehensive Impact Fee Study for Transportation, Parks, Law Enforcement and Fire/Rescue

ORIGINAL / RFP #25017 / JULY 3, 2025





Giving back

The Raftelis Charitable Gift Fund seeks to make a difference on issues that matter to our clients and employees by helping build sustainable, inclusive communities locally and worldwide. We do this by allocating company profits and employee contributions of time and money. We support organizations that:

- Promote efficient, sustainable resource use
- Advance diversity, equity, and inclusion within the public sector
- Invest in access to clean water and sanitation
- Help vulnerable communities by addressing affordability issues



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

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

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SECTION 1 – INTRODUCTION / COMPANY BACKGROUND

July 3, 2025

Ms. Mary E. Perez
Purchasing Agent
City of Deltona
2345 Providence Blvd.
Deltona, FL 32725

Subject: Proposal for Comprehensive Impact Fee Study for Transportation, Parks, Law Enforcement and Fire/Rescue (RFP No. 25017)

Dear Ms. Perez:

The City of Deltona (City) has experienced significant growth and redevelopment in recent years. Based on information as obtained from the U.S. Census Bureau, the City's population has grown by 7.2% since 2020 and 18% since 2010. Continued significant growth and redevelopment are anticipated to continue to occur for the foreseeable future. Growth and changing demographics require development policies and associated funding mechanisms such as impact fees to deal with the demands placed on the City's infrastructure and municipal services. Transportation, parks, law enforcement, and fire/rescue facilities must keep pace with these growth-related demands to maintain the City's standard of living. Accordingly, the City has issued a Request for Proposals (RFP) to update these impact fees.

Raftelis Financial Consultants, Inc. (Raftelis) is pleased to provide this submittal in response to the City's RFP to perform an Impact Fee Study to perform a review of the City's impact fees charged to new development. Based on the City's RFP, this study involves preparing an impact fee analysis for transportation, parks, law enforcement, and fire/rescue services. As you can see from our submittal, our proposed consulting team has significant expertise and experience in assisting municipal governments with establishing and implementing valid impact fees. We are committed to providing the City with quality and responsive professional services on this important project.

Raftelis has one of the largest consulting practices in the nation solely focused on the financial and management aspects of municipal government. Raftelis has more than 190 consultants located in 15 offices throughout the United States, and our capabilities include municipal and utility impact fees, utility rate and financial planning, asset management, cyber security, data and technology services, stormwater utility implementation, organizational assessments, and strategic planning for municipal governments. We have worked with more than 700 organizations in the last year alone. As the Project Director for this engagement, I will be responsible for overall project accountability and ensuring that the project team has the full support of Raftelis' resources. I have over 46 years of financial consulting experience, including a variety of impact fee issues.

The consultants in our local Florida office have completed and implemented over 50 successful municipal impact fee studies and will be assisted by staff that also have extensive experience with municipal impact fees. Our Project Manager will be Shawn Ocasio, who has over 16 years of experience in various municipal finance engagements, with a focus on utility and municipal impact fee projects. Our Quality Control/Quality Assurance Lead will be Joe Williams, one of our Senior Managers who also has extensive experience in developing and implementing

municipal impact fees across the state. Together, we have collaboratively assisted stakeholders and government leaders to make wise fiscal choices based on best practices for impact fees, infrastructure funding, and growth management.

In addition to Raftelis personnel, we are excited to team with Dwayne Guthrie, PhD, AICP. Dwayne is an independent practitioner with over 40 years of experience in impact fees and urban planning. Dwayne is a former employee of Raftelis, and we have continued to work with him on similar impact fee projects with great success. He has significant experience in preparing impact fee studies for municipal governments in Florida and throughout the country. He will be a valuable team member and contributor to this project. Dwayne will be primarily responsible for leading the technical analysis in support of the transportation impact fee analysis portion of the study. Also, as a subject matter expert he will also be involved in overall quality control and review of the various components of the study.

I am authorized to legally bind the company. We appreciate this opportunity to submit this proposal to the City on this important project and believe our proposed project team has the experience and expertise to successfully deliver the required impact fee consulting services to the City in a professional and cost-effective manner. If you have any questions about this proposal, please do not hesitate to contact us with the following contact information:

Henry Thomas, Senior Vice President (Project Director)
341 N. Maitland Avenue, Suite 300, Maitland, FL 32751
O: 407.960.1811 / E: hthomas@raftelis.com / F: 828.484.2442

Shawn Ocasio, Senior Manager (Project Manager)
341 N. Maitland Avenue, Suite 300, Maitland, FL 32751
O: 407.628.2600 / E: socasio@raftelis.com / F: 828.484.2442

Sincerely,



Henry Thomas
Senior Vice President (Authorized to bind)



Shawn Ocasio
Senior Manager

Who is Raftelis

HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE

Local governments partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 700 organizations in the last year alone.

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

RESOURCES & EXPERTISE: This project will require the resources necessary to effectively staff the project and the skillsets to complete all of the required components. With more than 190 consultants, Raftelis has one of the largest municipal industry rate and management consulting practice in the nation, including many of the industry's leading rate consultants and experts. Our depth of resources will allow us to provide the City with the technical expertise necessary to meet your objectives.

DEFENSIBLE RECOMMENDATIONS: When your elected officials and customers are considering the validity of recommended changes to municipal impact fees, they want to be confident that they were developed by experts using the latest industry standard practices and methods. In particular, an in-depth knowledge of statutory requirements as set forth in the Impact Fee Act and Florida case law related to impact fees is key to developing valid impact fee recommendations. Our staff are involved in shaping industry standards related to municipal finance and rate setting. Being actively involved in the development of impact fees for our municipal clients will allow us to keep the City informed of emerging trends and issues and to be confident that our recommendations are insightful and founded on sound industry principles. In addition, with Raftelis' registration as a Municipal Advisor, you can be confident that we are fully qualified and capable of providing financial advice related to all aspects of financial planning in compliance with federal regulations.

HISTORY OF SIMILAR SUCCESSES: An extensive track record of past similar work will help to avoid potential pitfalls on this project and provide the know-how to bring it across the finish line. Raftelis staff has assisted 1,700+ local governments throughout the U.S. with financial and rate consulting services with wide-ranging needs and objectives. Our extensive experience in developing municipal impact fees will allow us to provide innovative and insightful recommendations to the City and will provide validation for our proposed methodology ensuring that industry best practices are incorporated.

USER-FRIENDLY MODELING: A modeling tool that your staff can use for scenario analysis and financial planning now and into the future will be key for the City going forward. Raftelis has developed some of the most sophisticated yet user-friendly financial/rate models available in the industry. Our models are tools that allow us to examine different policy options and cost allocations and their financial/customer impacts in real time. We offer model options including Microsoft Excel-based and web-based tools that are developed with the expectation that they can be used by the client as a financial planning tool long after the project is complete.

RATES THAT ARE ADOPTED: For the study to be a success, rates must be successfully approved and implemented. Even the most comprehensive impact fee study is of little use if the recommendations are not approved and implemented. Raftelis has assisted numerous agencies with getting proposed rates successfully adopted. We focus on effectively communicating with elected officials about the financial consequences and rationale behind recommendations to ensure stakeholder buy-in and successful rate adoption.

32 years
serving the
public sector

How we stack up

OUR TEAM INCLUDES

190+ consultants focused on
finance/management/communication/
technology for the public sector

2 chairs & **16** members of
AWWA and WEF utility finance and
management committees and subcommittees

RAFTELIS HAS PROVIDED ASSISTANCE FOR

1,700+ public agencies
and utilities

that serve more than

25% of the
U.S. population

including the agencies serving

41 of the nation's
50 largest cities

in the past year alone, we worked on

1,300+ projects for **700+** agencies in **47** states

Subconsultant: DP Guthrie LLC

Dwayne Guthrie, PhD, AICP, is the Principal Member of DP Guthrie, LLC. His planning consulting firm strives to work for the common good through consensus building with public sector clients. Dwayne has 40 years of planning experience, including 10 years working for the public sector in Florida plus 30 years as a consultant (primarily with TischlerBise and Raftelis). Dwayne has served public sector clients throughout the nation, focusing on infrastructure planning and revenue strategies. During the preparation of impact fee programs in 27 states for approximately 180 clients, Dwayne helped community and government leaders make wise fiscal choices. He has a doctorate in Planning, Governance, and Globalization from Virginia Tech and a Masters of Arts in Urban and Regional Planning from the University of Florida. Dwayne specializes in demographic analysis, development impact fees, capital improvements plans, fiscal evaluations, and the interaction of transportation and land use. He taught graduate-level planning classes, as an adjunct professor at Virginia Tech, and Associate Professor of Practice at Catholic University of America. Dwayne is currently assisting Raftelis in developing transportation impact fees for the City of Canton, Georgia.

Contact Information

DP Guthrie, LLC was formed in November 2020. This is a Florida Limited Liability Company. The registered agent is Lynn B. Moot, Esq., 8996 Barco Lane, Jacksonville, FL, 32222. The physical and mailing address is below.

DP Guthrie, LLC

216 Jones St., New Bern, NC 28562

P: 443.280.0723 / E: dpguthriellc@gmail.com

Project Team

Below we have included an organizational chart showing the structure of our project team. In the next section, we have included resumes for each of our team members as well as a description of their role on the project.

City of Deltona



SECTION 2 – QUALIFICATIONS OF STAFF

Qualifications of Staff

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

Our team includes senior-level professionals to provide experienced project leadership with support from talented consultant staff. This close-knit group has frequently collaborated on similar successful projects. The table below summarizes each team member's workload utilization and time assigned to this project. Resumes for each team member, detailing their role, experience, and education are on the following pages in this section.

Name	Percentage of Time Assigned to Project	Current and Projected Workload/Utilization
Henry Thomas	5%	50%
Shawn Ocasio	12%	70%
Joe Williams	3%	70%
Michelle Galvin	15%	80%
TJ Spelght	15%	80%
Dwayne Guthrie, PHD, AICP	10%	60%

Henry Thomas

PROJECT DIRECTOR

Senior Vice President



ROLE

Henry will be responsible for overall project accountability and will be available to provide quality assurance and control, industry perspective, and insights into the project.

PROFILE

Henry has over 46 years of utility industry rate and financial experience focusing on business issues facing water, wastewater, solid waste, natural gas, electric, and stormwater utilities. Henry's experience includes directing financial consulting services for publicly owned utilities and governmental entities. He has been responsible for preparing utility rate and cost-of-service studies, business plans, bond feasibility studies, designing water conservation rates, connection and development fees, municipal impact fees, developing utility financial policies and assisting with the acquisition of utility properties and other management consulting services. During his career, he has served over one hundred and twenty clients including county and municipal governments and publicly owned utility districts, authorities, and cooperatives. Henry is currently directing municipal impact fee studies for the Cities of Apopka, Panama City Beach, and Tampa, Florida, and the City of Canton, Georgia.

Years with Firm: 6

Years with Other Firms: 40

Specialties

- Business/strategic plans
- Cost-of-service & rate studies
- Bond financing
- Water conservation rates
- Contract negotiation
- Utility acquisitions
- Development fees
- Municipal impact fees

Professional History

- Raftelis: Senior Vice President (2025-present); Vice President (2019-present); Senior Vice President, PRMG (1994-2019)

Education

- Bachelor of Science in Business Administration, Economics - University of Florida (1977)

Professional Memberships

- Florida Government Finance Officers Association
- AWWA

KEY PROJECT EXPERIENCE / JOB ASSIGNMENTS FOR OTHER PROJECTS

City of Lakeland (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served the City of Lakeland (City) since 2009 providing utility rate, financial planning, and management consulting services to the water and wastewater utility systems. On behalf of the City, Henry has directed a comprehensive cost-of-service/rate study and annual revenue sufficiency updates. Major issues addressed for the City include water conservation rates and rate structures that promote revenue stability and evaluating the size and timing of capital projects.

Polk County (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served Polk County since 2013 providing utility rate, financial planning, and management consulting services to the water and wastewater systems. His experience includes directing utility rate and cost-of-service studies including the development of water conservation rate structures and preparing bond feasibility studies.

Charlotte County (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served Charlotte County Utilities (County) since 1996 providing utility rate, financial planning, and management consulting services to the County's water and wastewater systems. As part of this ongoing engagement Henry has directed comprehensive water and wastewater rate studies, bond feasibility studies, utility valuations, impact fee studies and assisted in the development of water conservation rates and utility expansion policies and the evaluation of wholesale rate issues related to the Peace River/Manasota Water Supply.

City of Ocala (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served the City of Ocala since 1992 providing utility rate, financial planning, and management consulting services to the water and wastewater systems. Henry has directed comprehensive water and wastewater cost-of-service/rate studies and annual revenue sufficiency updates for the City. He has also been involved in the development of system development charges, water conservation rates and strategies related to providing incentives for growth and economic development.

City of Tampa (FL): Utility Rate Consulting Services

Henry has served the City of Tampa since 2005. He has directed comprehensive, water, wastewater and solid waste rate studies, and annual revenue sufficiency updates, and municipal impact fee studies and capital charges related to new development, participated in City's water and wastewater master planning process to evaluate the financial impact of capital projects and prepared bond feasibility studies associated with the issuance of long-term debt.

City of Titusville (FL): Utility Rate Consulting Services

Henry has served the City of Titusville, Florida since 2000. He has directed comprehensive water and wastewater rate studies and annual revenue sufficiency updates and municipal impact fee studies. In addition, he has been involved in providing capital funding plans for State Revolving Loans from the State of Florida, Department of Environmental Protection (FDEP) and assisted in negotiations related to the formation of a joint public/private entity to provide future water supplies for the City.

PROJECT LIST

- Apopka (FL)
- Auburn, AL
- Bartow (FL)
- Cape Coral (FL)
- Casselberry (FL)
- Citrus County Utilities (FL)
- Clermont (FL)
- Cocoa Beach (FL)
- Crystal River (FL)
- Dade City (FL)
- Dania Beach (FL)
- Destin Water Users (FL)
- Dundee (FL)
- Edgewater (FL)
- Enterprise, CDD (FL)
- Fort Pierce Utilities Authority (FL)
- Fort Walton Beach (FL)
- Gasparilla Island Water Association (FL)
- Greater Pine Island Water Association (FL)
- Groveland (FL)
- Haines City (FL)
- Hallandale Beach (FL)
- Helena (MT)
- Immokalee Water and Sewer District (FL)
- Inverness (FL)
- Jacksonville Electric Authority (JEA) (FL)
- Lakeland (FL)
- Largo (FL)
- Lee County Electric Cooperative (FL)
- Leesburg (FL)
- Maitland (FL)
- Melbourne (FL)
- Midway Water System (FL)
- Miramar (FL)
- Mount Dora (FL)
- Newberry (SC)
- New Smyrna Beach Utilities Commission (FL)
- North Port (FL)
- Oakland Park (FL)
- Ocoee (FL)
- Okeechobee Utility Authority (FL)
- Oldsmar (FL)
- Orange City (FL)
- Orlando Utilities Commission (FL)
- Oviedo (FL)
- Palatka (FL)
- Palm Bay (FL)
- Palm Coast (FL)
- Panama City (FL)
- Panama City Beach (FL)

- Pembroke Pines (FL)
- Plant City (FL)
- Polk County Utilities (FL)
- Port Orange (FL)
- Regional Utilities of Walton County (FL)
- Sanford (FL)
- South Walton County Utilities (FL)
- Stuart (FL)
- Sunrise (FL)
- Town of Bedford (NH)
- Town of Davie (FL)
- Town of Goffstown (NH)
- Umatilla (FL)
- Vero Beach (FL)
- Virgin Islands Water and Power Authority (Virgin Islands)
- Volusia County Utilities (FL)
- Wabash Valley Power Association (IN)
- Warner Robins (GA)
- West Melbourne (FL)
- Winter Springs (FL)

LITIGATION EXPERIENCE

Henry has directed regulatory rate cases for the Virgin Islands Water and Power Authority and Charlotte County, Florida and has testified before the Florida Public Service Commission, the Indiana Public Service Commission, the Virgin Islands Public Services Commission, and District Courts in Florida and Michigan.

PUBLICATIONS

- "Utility Impact Fees: Practices and Challenges" AWWA, 2013
- "Water and Wastewater Impact Fees," South Carolina Section of the AWWA, Management Forum, 2001
- "Innovative Water Rates," North Florida Section of the AWWA, 2011

PRESENTATIONS

- "Electric Utility Rates in a Competitive Environment," National Rural Electric Cooperative Association (NRECA) Managers Conference, 1995
- "Innovative Electric Rates," NRECA Marketing, Member Services and Communication Conference, 1995
- "Electric Utility Rate Making," NRECA National Directors Conference, 1996
- "Water Rates and Conservation Practices," Florida Water Resources Association Conference, 2007
- "Communicating Water Utility Rate Needs," Florida Rural Water Association's Annual Technical and Training Conference, 2010

PROFESSIONAL HONORS

- AWWA Management and Leadership Division's 2013 Best Paper Award

Shawn Ocasio

PROJECT MANAGER

Senior Manager



ROLE

Shawn will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. He will also lead the consulting staff in conducting analyses and preparing deliverables for the project. Shawn will serve as the City's main point of contact for the project.

PROFILE

Shawn has 16 years of rate and financial consulting experience and has participated on a variety of projects for water, wastewater, reclaimed water, stormwater, and solid waste management utility enterprise systems throughout Florida, Georgia, Alabama, and Virginia. These projects have included revenue sufficiency analyses, cost of service rate design and utility miscellaneous fee design studies, retail and wholesale water rate design engagements, bond feasibility studies, general fund indirect cost allocation analyses, and customer bill impact evaluations. A major area of focus for Shawn is in the development of general government and utility impact fees. He has developed impact fees for police, fire/rescue, parks and recreation, libraries, and general government/administrative municipal services as well as water, wastewater, and reclaimed water utility services for municipal clients updating existing fees and/or implementing fees for the first time. Shawn is currently the project manager for impact fee studies being conducted for the Cities of Apopka, Panama City Beach, Palm Coast, and Tampa, Florida, and the City of Canton, Georgia.

Years with Firm: 6

Years with Other Firms: 10

Specialties

- Computer financial model development
- Revenue sufficiency analyses
- Cost-of-service & rate studies
- Retail and wholesale rate design
- Financing feasibility analyses
- Utility connection/development fees
- Municipal impact fees

Professional History

- Raftelis: Senior Manager (2025-present); Manager (2021-2024); Senior Consultant (2019-2020); Rate Consultant, PRMG (2009-2019)

Education

- Bachelor of Science in Business Administration in Accounting & Finance - University of Central Florida (2008)

Professional Memberships

- AWWA
- Florida Government Finance Officers Association

KEY PROJECT EXPERIENCE / JOB ASSIGNMENTS FOR OTHER PROJECTS

City of Ormond Beach (FL): Municipal Impact Fee and Utility Connection Fee Study

Shawn conducted a comprehensive analysis to update the City of Ormond Beach's water and wastewater utility connection fees, as well as its parks and recreation, stormwater, and transportation (local roads and mobility fees) impact fees. To execute this project, Shawn collaborated with a transportation engineering consultant and an impact fee attorney to address transportation impact fees and provide related legal guidance. The study encompassed a review of the City's Level Of Service (LOS) standards for all utility and municipal services, an analysis of historical population trends and future population and dwelling unit projections, and an evaluation of existing and future capital investments to accommodate new growth. Impact fees were developed for both residential and nonresidential property types. Additionally, the study included a feasibility analysis to determine the viability of implementing new police and fire impact fees, culminating in the development of proposed fees for these services. Shawn also contributed to the review of draft impact fee ordinances prepared by the City's legal counsel and participated in public workshops and City Commission hearings to present the fee analysis, key observations and assumptions, fee application methodologies, and proposed impact and connection fees. The study's recommendations were well received and implemented by the City's Commission.

City of Clermont (FL): Municipal and Utility Impact Fee Study

Shawn has participated in two studies (most recently in 2023) on behalf of the City of Clermont (City) examining the impact fees for water, wastewater, police, fire rescue, and parks and recreation services. Both of these studies involved reviewing the City's current Levels of Service (LOS), analyzing and projecting population growth and residential dwelling units, reviewing current residential occupancy factors, as well as assessing existing assets and future expansion related capital needs to accommodate new growth and development. Based on this analysis, proposed impact fees were developed for both residential and nonresidential properties. The findings and recommendations were presented before the City Commission and were successfully implemented by the City.

City of Lake Wales (FL): Water, Wastewater, Police, Fire Rescue, Parks and Recreation, and Library Impact Fees

Shawn conducted a study of the water, wastewater, police, fire rescue, parks and recreation, and library impact fees for the City. The study included a review of the City's existing Levels of Service (LOS), an analysis and projection of population and dwelling units, and an evaluation of existing assets and future capital requirements to serve new growth. Proposed Impact fees were then developed for residential and nonresidential property types. The results of the study were subsequently presented to City leadership the proposed impact fees were successfully adopted and implemented.

City of Longwood (FL): Police, Fire Rescue, Recreation, and Administrative / Public Works Impact Fee Study

Shawn performed an impact fee study for the City of Longwood's (City) police, fire rescue, recreation, and administrative / public works services. The study included an analysis of historical population and unit growth trends, the development of a forecast of projected residential and nonresidential growth as well as a review of existing Levels of Service (LOS), current and planned capital facilities, development of functional population-based factors based on trip generation and City demographic information, and the design of the fees by service type and customer class. Shawn also developed the detailed study disclosure report and supporting presentation briefing documents for usage in the public hearings and presented the results to the City's leadership. The proposed fees resulting from this analysis were successfully adopted by the City and subsequently implemented.

City of Winter Garden (FL): Police, Fire Protection, and Recreational Municipal Impact Fees

Shawn has assisted in an analysis of the City of Winter Garden's (City) police, fire protection, and recreational municipal impact fees. During this project, he performed an analysis of population projections, dwelling unit relationships, and developed corresponding growth projections. He also assisted in discussions with the City regarding the determination of level of service (LOS) standards and the capital requirements needed to serve new development. Shawn then assisted in the design of the impact fees for the residential and non-residential customer classes. The proposed fees were successfully implemented as a result of this study.

City of Oakland Park (FL): Utility and Municipal Impact Fee Feasibility Analysis and Recreation Fee Updates

Shawn performed an impact fee feasibility analysis for the City of Oakland Park's (City) stormwater, solid waste, police, fire/EMS, library, general government and parks and recreation services. This feasibility analysis included a review of capital cost information, level of service criteria, typical/hypothetical fee levels, industry standards and norms and typical application methods for stormwater, solid waste, police, fire/EMS, library, general government and parks and recreation impact fees. This analysis then included a review of the type and extent of the City's anticipated development to develop an estimate of potential revenues to assess the potential benefit to the City of implementing the various impact fees. Based on the results of the feasibility analysis, Shawn then completed a parks and recreation impact fee study for the City. Since the initial study Shawn has also performed an update to the City's parks and recreation impact fees which resulted in a successful adoption of the proposed revised fees.

City of Miramar (FL): Police, Fire Protection, and Recreational Municipal Impact Fee Study

Shawn conducted a municipal impact fee study for the City of Miramar (City) that included fees associated with police, fire protection, and recreational services. This study included an analysis of growth and population projections, dwelling units, call data, and Level of Service (LOS) standards, and existing and planned capital facilities. For police and fire protection services the impact fees were designed for residential and non-residential classes of customers. The fees designed in the recreation services analysis were for residential customers only and included the development of a recreation impact fee for facilities and a separate community parks land dedication fee for land for properties not covered by a land donation agreement. Shawn has also assisted in the performance of stormwater revenue sufficiency studies for the City. These studies included developing projections of operating expenses, revenues, capital funding and then evaluation of the overall revenue sufficiency of the system and developing rate recommendations for implementation.

Shawn is currently involved in managing municipal impact fee studies for the Cities of Tampa, Panama City Beach, and Apopka, Florida.

PROJECT LIST

- Alexandria Renew Enterprises (VA)
- City of Apopka (FL)
- City of Bartow (FL)
- City of Boynton Beach (FL)
- City of Canton (GA)
- City of Cape Coral (FL)
- City of Casselberry (FL)
- Charlotte County (FL)
- Citrus County (FL)
- City of Dade City (FL)
- Town of Davie (FL)
- City of Deerfield Beach (FL)
- Destin Water Users (FL)
- Englewood Area Fire Control District (FL)
- City of Groveland (FL)
- City of Hallandale Beach (FL)
- Holley-Navarre Fire District (FL)
- Immokalee Water and Sewer District (FL)
- Town of Lake Park (FL)
- Manatee County (FL)
- Midway Water System, Inc. (FL)
- City of Mount Dora (FL)
- City of Ocala (FL)
- City of Oviedo (FL)
- Okeechobee Utility Authority (FL)
- City of Palm Coast (FL)
- City of Panama City Beach (FL)
- Pinellas Suncoast Fire & Rescue District (FL)
- City of Port Orange (FL)
- City of St. Cloud (FL)
- City of St. Pete Beach (FL)
- Sarasota County (FL)
- City of Stuart (FL)
- City of Titusville (FL)
- City of Treasure Island (FL)
- City of Umatilla (FL)
- City of Valdosta (GA)
- Wakulla County (FL)
- City of Warner Robins (GA)

Joe Williams

TECHNICAL ADVISOR / QUALITY ASSURANCE / QUALITY CONTROL

Senior Manager



Years with Firm: 13

ROLE

Joe will provide oversight for the project ensuring it meets both Raftelis and industry standards and an independent quality assurance/quality control review of key deliverables to ensure accuracy and completeness.

PROFILE

Joe currently serves as a Senior Manager in Raftelis' Maitland, FL office. He has over 13 years of experience in finance, management, and rate consulting for utility and other municipal clients. His expertise lies in the areas of developing utility rate studies, impact fees, bond feasibility reports, building fees, miscellaneous fees, and other related financial solutions based on technical analysis and unique needs of each client. He has worked with staff, leadership, and governing bodies for municipal utilities to find solutions to financial and managerial issues that can arise in providing sustainable and effective service delivery.

Specialties

- Utility cost-of-service & rate structure studies
- Bond feasibility reports
- Long-range financial planning & feasibility studies
- Impact fee studies (utility & municipal)

Professional History

- Raftelis: Senior Manager (2023-present); Manager (2020-2022); Senior Consultant (2018-2019); Consultant (2015-2017); Associate Consultant (2013-2014); Analyst (2012)

Education

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

KEY PROJECT EXPERIENCE / JOB ASSIGNMENTS FOR OTHER PROJECTS

City of Lake Alfred (FL): Water, Wastewater, and Stormwater Rate Study, Impact/Connection Fee Study

Joe has been led several projects for the City of Lake Alfred (City) since 2016 including a water, wastewater, and stormwater rate study, an impact fee/connection fee study in 2018 including water, wastewater, police, fire, parks, and general government capital charges. Each of these studies were completed in a timely fashion with all recommendations being adopted by City Council. The rate study identified the ability to move away from having minimum gallons included for the monthly water bill and away from a fixed monthly sewer charge for all residential connections. Instead, a base and usage charge structure was implemented that allows for encouraging water conservation in times of significant growth in the City, and throughout Polk County, that is putting unprecedented demands on the water resources available. In light of these challenges, Raftelis is currently engaged with the City to update the water and wastewater rate study, as well as all of the impact and connection fees, to identify the appropriate solutions for the City to manage this time of growth and capital investment. Additionally, Raftelis is updating the City's building fee schedule for plan review and inspection fees related to enforcing the Florida Building Code.

City of Winter Haven (FL): Utility Rate Study, Fire Assessment Study, Municipal Impact Fee Study

Raftelis has been engaged by the City of Winter Haven (City) for many years to assist with a variety of projects including utility rate and capital charge studies to developing potential Fire Assessments within the City at targeted revenue levels. Joe led the effort throughout 2021 and 2022 on updating the City's capital connection charges and rate study that included development and update of the City's rate structure, industrial wastewater rates related to strength factors and related surcharges, and large user arrangements. The project team worked closely with City staff to develop solutions that would meet the utility's needs as well as provide a just and equitable set of rates and

charges for all new and existing customers. Raftelis is currently engaged to assist with updating the City's municipal impact fees for Police, Fire, and Parks and Recreation services.

City of Auburndale (FL): Revenue Sufficiency Study

Raftelis has been engaged with the City of Auburndale (City) for many years working on utility rates and impact fees. In 2021 a comprehensive utility rate study, including capital funding and rate design adjustments, as well as an update to the utility capital connection charges was completed. Based on current industry trends and input from staff, certain adjustments were made to the rate structure and the application basis of the impact fees to represent a more fair and equitable revenue generation system for the utility. Each of the recommendations were implemented and adopted by the City Commission.

St. Johns County (FL): UCF Study

Raftelis has been engaged with the St. Johns County (County) Utilities Department for many years and has completed studies ranging from water and wastewater capital connection fee studies for the Main and Ponte Vedra systems, bond feasibilities, rate studies, system consolidation studies, and other similar financial efforts. Recently, Raftelis completed an update of the water and wastewater capital connection fees to represent the current cost of providing utility capacity for new development. This study reviewed the level of service (LOS) provided to growth and identified credits to account for other funding sources in light of the rapid growth occurring in the County. Raftelis is currently engaged with the County to provide a bond feasibility study, that will obtain funding for new wastewater plants to accommodate the demands from growth as well as regulatory requirements, and a miscellaneous fee study that is intended to assess fee levels and update to reflect the full cost to the County of providing these services (i.e., meter tap and installation charges, service fees, and other related miscellaneous charges).

Florida Keys Aqueduct Authority (FL): System Development Charge Study, Miscellaneous Charge Review, and Water and Wastewater Revenue Sufficiency

Joe has been involved with several projects for the Florida Keys Aqueduct Authority (FKAA) since 2013 including a system development charge study, a comprehensive review of existing miscellaneous charges, and a water and wastewater sufficiency analysis for a greatly expanded wastewater customer base. In 2019 Raftelis was engaged to complete a bond feasibility analysis for issuance of bonds to fund \$50 million of projects, while maintaining a strong credit rating through strong reserve, coverage, and cash flow projects. FKAA is using short term loans in conjunction with WIFIA loans to maximize the cash flow and affordability of the borrowing.

City of Port St. Lucie (FL): Water, Sewer, and Reclaimed Water Rate Study and Water and Sewer Impact Fee Update

Raftelis has been working with the City of Port St. Lucie (City) since 2011. Recently, several major studies have been completed to ensure the water and sewer utilities are funding a high level of renewal and replacement costs associated with their low pressure sewer system and grinder pumps. In 2015, a comprehensive five-year water and sewer rate study was completed which identified a program to fully fund the capital needs, maintain adequate reserve funds, and provide strong debt service coverage with modest rate adjustments of 1.5% per year. Additionally, it was identified there were opportunities to adjust the overall revenue recovery between the water and sewer rate structures. Also in 2015, a water and sewer impact fee study was completed to bring these fees into alignment with the current high growth environment the utility is in. In 2019, Raftelis was tasked with updating the water and sewer financial forecast to factor in a significant increase in capital requirements due to expansion needs and additional renewal and replacement requirements. Through strong growth and management of the utility's financials, Port St. Lucie is able to maintain rate adjustments around annual inflationary levels.

Pinellas County Utilities (FL): Rate Sustainability and Business Case

Joe is assisting with development of the long-term revenue sufficiency and sustainability forecast. This includes rate design for the water and sewer systems that targets enhanced revenue stability, strong equity amongst various customer classes, and continuity between the systems. He is also assisting with incorporating scenarios developed in the business case into the revenue sufficiency forecast.

City of Marathon (FL): Wastewater and Stormwater Financial Forecast

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

City of Tavares (FL): Bond Feasibility and General Consulting Services and Water, Wastewater, Reclaimed Water and Stormwater Revenue Sufficiency Study

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

Volusia County (FL): SE Service Area Valuation, Water and Wastewater Rate Study

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

PROJECT LIST

- Alabaster Water Board (AL) – Water rate study
- Auburn Water Works Board (AL) – Water rate study and miscellaneous charge review
- City of Auburn (AL) – Sewer rate study
- City of Alachua (FL) – Reclaimed water study
- City of Atwater (CA) – Water rate study
- City of Auburndale (FL) – Revenue sufficiency study
- City of Bartow (FL) – Fire fees
- Bonita Springs Utilities (FL) – Water and wastewater rate study
- Brunswick-Glynn County JWSC (GA) - Water and wastewater rate design and financial forecast
- Cassatt Water Company (SC) – Water rate study
- Charlotte County (FL) – Dispute resolutions
- City of Clarksville (TN) – Water and wastewater financial planning
- City of Clearwater (FL) – Utility customer service efficiency review
- Emerald Coast Utilities Authority (FL) – Water and wastewater bond feasibility
- Florida Keys Aqueduct Authority (FL) – System development charge study, miscellaneous charge review, and water and wastewater revenue sufficiency
- City of Fort Walton Beach (FL) – Water, wastewater and stormwater rate study
- City of Goodyear (AZ) – Water, wastewater, police, fire, recreation, and streets development impact fee study
- Indian River County (FL) – AMR/AMI feasibility study

- City of Groveland (FL) – Utility rate study
- Village of Islamorada (FL) – Wastewater update
- City of Marathon (FL) – Wastewater and stormwater financial forecast
- City of Margate (FL) – Development of a utility financial model
- Town of Oakland (FL) – Water rate study, wastewater rate development, municipal impact fee study, and utility impact fees
- City of Phoenix (AZ) – Biannual development impact fee audit
- Pinellas County Utilities (FL) – Rate sustainability and business case
- City of Port St. Lucie (FL) – Water, sewer, and reclaimed water rate study and water and sewer impact fee update
- City of Sanford (FL) – Municipal impact fee study
- St. Johns County (FL) – UCF study
- Town of Sullivan's Island (SC) – Water and wastewater rate study
- City of Tavares (FL) – Bond feasibility and general consulting services and water, wastewater, reclaimed water and stormwater revenue sufficiency study
- Volusia County (FL) – SE service area valuation, water and wastewater rate study
- City of Winnipeg – Cost-of-service analysis
- City of Winter Springs (FL) – Municipal impact fee study

Michelle Galvin

LAW ENFORCEMENT, FIRE/RESCUE, AND PARKS IMPACT FEE ANALYSIS

Senior Consultant



Years with Firm: 7

ROLE

Michelle will work at the direction of Shawn in conducting impact fee analyses for law enforcement, fire/rescue, and parks and preparing deliverables for the project.

PROFILE

With a background in statistical analysis and surveying, Michelle joined Raftelis as an intern in 2018 and later became a Consultant upon graduating from the University of Central Florida in May 2019. Her primary expertise includes municipal impact fee development, utility financial and rate analyses, functional population, and customer billing statistics.

Specialties

- Municipal impact fee development
- Utility financial and rate analyses
- Rate modeling
- Functional population
- Data collection and analysis

Professional History

- Raftelis: Senior Consultant (2025-present); Consultant (2022-2024); Associate Consultant (2019-2021); Intern (2018-2019)

Education

- Bachelor of Science in Statistics - University of Central Florida (2019)

KEY PROJECT EXPERIENCE / JOB ASSIGNMENTS FOR OTHER PROJECTS

City of Clermont (FL): Water and Sewer Connection Fee Study, Municipal Impact Fee Study

Michelle served as a consultant for the City of Clermont (City) on the review and update the utility connection fees and municipal impact fees. She assisted with conducting interviews with staff, performed data collecting and analytics, and developed a model to calculate water and wastewater connection fees and police, fire, and recreation impact fees.

City of Groveland (FL): Water and Wastewater Revenue Sufficiency Study and Connection Fee Study

Michelle served as a consultant for the City of Groveland (City) for a study to provide a five-year funding plan for the City's water and wastewater system. She built a model to project growth, revenues, operating expenses, and capital expenses to help develop a five-year rate plan. She also built a model to review and update the City's connection fees. Using existing assets, capital improvement plans, and level of service data, she helped calculate updated fees for the City.

City of Maitland (FL): Fire and Parks and Recreation Impact Fee Study

Michelle served as a consultant for the City of Maitland (City) for a study to update the existing fire and recreational impact fees. She reviewed historical and projected growth trends, and existing and planned capital facilities to calculate impact fees for fire and recreation.

City of Cocoa Beach (FL): Stormwater Revenue Sufficiency Study

Michelle was a consultant for the City of Cocoa Beach (City) on a study to perform a revenue sufficiency analysis on the City's stormwater system. She developed a model to forecast fiscal requirements, CIP funding, customer account growth, and debt service to develop rate recommendations.

Hernando County (FL): Fire and EMS Assessment Fee Study

Michelle served as a consultant for Hernando County (County) on a study to review and update the existing fire and emergency medical services (EMS) assessment fees. She assisted in developing a model to review historical call data to allocate operating costs and future capital improvements between various land classes.

Collier County (FL): Water and Wastewater Revenue Sufficiency Study, Connection Fee Study, and Miscellaneous Fee Study

Michelle worked as a consultant for Collier County (County) on various water and wastewater utility studies including a revenue sufficiency, connection fees, and miscellaneous. She helped develop models that reviewed growth projections, level of service standards, fiscal requirements, and significant capital improvement funding which included half a billion dollars in new debt financing.

Town of Oakland (FL): Water and Wastewater Revenue Sufficiency Study

Michelle worked as a consultant for the Town of Oakland (Town) for a study to perform a revenue sufficiency analysis on the water and wastewater system. She developed a model to review the growth projections, capital improvements, fiscal requirements, and bulk service agreements to help develop a five-year rate plan. She assisted in reviewing and calculating pass-through adjustments for the wastewater as the Town receives services from a bulk provider.

Englewood Area Fire Control District (FL): Fire Impact Fee Study

Michelle served as a consultant for the Englewood Area Fire Control District (District) to review and update the fire impact fees. She reviewed growth and population projections, dwelling units, call data, level of service standards, and existing and planned capital facilities. She also developed a functional population model to calculate fire impact fees based on various land use types.

City of Palatka (FL): Water and Wastewater Connection Fee Study and Municipal Impact Fee Study

Michelle served as a consultant for the City of Palatka (City) to review and update the utility connection fees and municipal impact fees. During this project, she performed an analysis of population projections, development trends, and developed corresponding growth projections. She also used functional population to develop a model to calculate impact fees for police, fire, and recreation.

City of Port St. Lucie (FL): Water and Wastewater Rate Study

Michelle has worked as a consultant with the City of Port St. Lucie (City) for various studies over the years. She has helped develop and update models to review growth projections, capital improvements, fiscal requirements, and identified necessary rate adjustments for the City's water and wastewater systems.

City of Lake Alfred (FL): Water and Wastewater Revenue Sufficiency Study, Water and Wastewater Connection Fee Study, and Municipal Impact Fee Study

Michelle has served as a consultant for the City of Lake Alfred (City) on various projects including a revenue sufficiency study, and update to the existing water and wastewater connection fees, and an update to the municipal impact fees. She developed models to review growth projections, level of service standards, and existing and proposed capital facilities to develop water and wastewater connection fees and police, fire, recreation, and general government.

City of Winter Springs (FL): Water and Wastewater Revenue Sufficiency Study

Michelle served as a consultant for the City of Winter Springs (Winter Springs) on a water and wastewater revenue sufficiency study. She created a model to review and forecast five years of the City's utility operations. She reviewed projected revenues, fiscal requirements, and significant capital improvement funding that included a replacement of both wastewater treatment plants.

Bonita Springs Utilities, Inc. (FL): Water and Wastewater Miscellaneous Study

Michelle served as a consultant for Bonita Springs Utilities Inc. (Utility) to review existing water and wastewater miscellaneous charges and provide recommendations for additional fees. She developed an interactive model and interviewed staff to calculate and recommend fees for the Utility.

City of Cape Canaveral (FL): Wastewater Revenue Sufficiency Study

Michelle served as a consultant for the City of Cape Canaveral to perform a wastewater revenue sufficiency analysis for the City. She developed a model that forecasted revenue sufficiency, fiscal requirements, CIP funding, and identified necessary rate adjustments for the City's wastewater system.

City of Auburndale (FL): Water and Wastewater Revenue Sufficiency Study, Water and Wastewater Connection Fees Study

Michelle served as an associate consultant for the City of Auburndale (City) on a project to provide a water and wastewater revenue sufficiency study and update existing water and wastewater connection fees. She developed a model that forecasted rate revenues, operating expenses, capital projects, wholesale purchases, and debt to project revenue requirements and assisted in providing rate recommendations.

Town of Wilton Manors (FL): Water, Wastewater, and Stormwater Revenue Sufficiency Study, Municipal Impact Fees and Utility Connection Fees Study

Michelle served as an associate consultant on a project with the Town of Wilton Manors (Town) to provide a water, wastewater, and stormwater revenue sufficiency study. Michelle analyzed customer statistics, wholesale agreements, and capital improvement programs to forecast a ten-year projection of the Town's utility operations. She also developed a model to calculate municipal impact fees and utility connection fees.

City of Lake Wales (FL): Water and Wastewater Connection Fees Study and Municipal Impact Fees Study

Michelle served as an associate consultant for the City of Lake Wales (City) on a project to calculate water and wastewater connection fees and municipal impact fees. She developed a functional population model to calculate impact fee equivalencies based on land uses. She developed a model to calculate municipal impact fees for police, fire, parks and recreation, and library in addition to water and wastewater connection fees.

City of Tavares (FL): Water and Wastewater Revenue Sufficiency Study

Michelle served as an associate consultant on a project with the City of Tavares (City) to provide a water and wastewater revenue sufficiency study. Michelle analyzed customer statistics, debt agreements, and capital improvement programs to forecast a projection of the City's utility operations.

City of DeFuniak Springs (FL): Police and Fire Impact Fees Study

Michelle served as an associate consultant for the City of DeFuniak Springs (City) to calculate police and fire services impact fees. She developed a functional population model to calculate impact fee equivalencies based on land uses.

City of Ormond Beach (FL): Municipal Impact Fees and Utility Connection Study

Michelle served as an associate consultant on a project with the City of Ormond Beach (City) to calculate municipal impact fees and utility connection charges. She developed a functional population model to calculate impact fee equivalencies based on land uses. She used the model to calculate police, fire, and parks and recreation impact fees along with water and wastewater connection charges.

St. Johns County (FL): Water and Wastewater Rate Study

Michelle served as an associate consultant on a project with St. Johns County (County) to provide water and wastewater financial consulting services. She has created a comprehensive financial model to analyze rates, revenues, debt service, debt service coverage, and reserves over a 10-year forecast period. Michelle has also assisted with a cost-of-service study. This project includes analyzing the existing and projected cost basis of utility operations and evaluating the appropriateness of its existing water and wastewater rate structures.

City of Lake Clarke Shores (FL): Water and Wastewater Rate Study

Michelle served as an associate consultant on a project with the City of Lake Clarke Shores (City). She developed a financial model to provide water and wastewater consulting services. She modeled several water and wastewater wholesale agreements to calculate costs to the City.

Wakulla County (FL): Wastewater Revenue Sufficiency Study, Wastewater Connection Fees Study

Michelle served as an associate consultant on several projects with Wakulla County (County). She has created a wastewater revenue sufficiency model to forecast twenty years of County utility operations. She has also worked on a wastewater connection fee study which she analyzed current wastewater treatment facilities, wastewater assets, and planned system improvements to come up with a connection fee for the County. She also assisted with an analysis of the County's existing wastewater miscellaneous fees.

Tampa Bay Water (FL): Reclaimed Water Pricing Project

Michelle served as an associate consultant on a project for Tampa Bay Water. She has assisted on a project to develop a uniform way of allocating credits to member governments for reclaimed water capital projects that benefits Tampa Bay Water. She has also helped with interviews with all member governments.

Town of Dundee (FL): Water and Wastewater Connection Fees and Impact Fees Study

Michelle served as an associate consultant for the Town of Dundee (Town) on a project to calculate water and wastewater connection fees and municipal impact fees. She developed a functional population model to calculate impact fee equivalencies based on land uses. She developed a model to calculate impact fees for fire, parks and recreation, library, water, and wastewater.

City of Frostproof (FL): Water and Wastewater Rate Study

Michelle served as an associate consultant for the City of Frostproof (City). She analyzed customer billing statistics to assisted with rate design and created a model to forecast the City's financials over a ten-year period.

City of Dunnellon (FL): Police and Parks Impact Fees Study

Michelle served as an associate consultant on a project with the City of Dunnellon (City). She developed a financial model to determine appropriate development impact fees for the City's Police and Parks departments.

City of Fort Walton Beach (FL): Utility Financial Consultant Services

Michelle served as an associate consultant on a project with the City of Fort Walton Beach (City) to provide water, wastewater, stormwater, and sanitation financial consulting services. She has created a comprehensive financial model to analyze rates, revenues, debt service, debt service coverage, and reserves over a five-year period.

Regional Utilities, Florida Community Services Corporation of Walton County (FL): Water and Wastewater Revenue Sufficiency Study

Michelle served as an associate consultant on a project with Regional Utilities (Utility) to provide a water and wastewater revenue sufficiency study. The project involved an analysis of operating revenue requirements, existing fixed capital assets, customer growth, and future capital improvement projects. Michelle also assisted with a rate design study which includes analyzing and evaluating alternate rate structures for the Utility that remains revenue neutral.

City of Riviera Beach (FL): Water and Wastewater Revenue Sufficiency Study

Michelle served as an associate consultant on a project with the City of Riviera Beach to provide a water and wastewater revenue sufficiency study. The project involved an analysis of operating revenue requirements, existing fixed capital assets, customer growth, and future capital improvement projects.

City of St. Cloud (FL): Water and Wastewater Revenue Sufficiency Study

Michelle served as an associate consultant on a project with the City of St. Cloud to provide a water and wastewater revenue sufficiency study. The project involved an analysis of operating revenue requirements, existing fixed capital assets, customer growth, and future capital improvement projects.

2024, 2022, 2020, 2018 Florida Water and Wastewater Surveys

Michelle assisted with contacting and following up with utilities all across Florida. She assembled the surveyed data with included over 200 utilities and provided analyses, charts, and tables for the survey publications.

TJ Speight

LAW ENFORCEMENT, FIRE/RESCUE, AND PARKS IMPACT FEE ANALYSIS

Consultant



Years with Firm: 5

ROLE

TJ will work at the direction of Shawn in conducting impact fee analyses for law enforcement, fire/rescue, and parks and preparing deliverables for the project.

PROFILE

TJ has contributed to projects for water, wastewater, solid waste, and stormwater systems. These projects have focused on revenue sufficiency analyses, impact fee development analyses, customer statistical analyses, financial sensitivity analyses, design of retail rates, design of miscellaneous fees, and meter replacement cost benefit analyses. TJ is currently involved in an impact fee study for the City of Canton, Georgia.

Specialties

- Financial modeling
- Utility rate analysis
- Revenue sufficiency studies
- Customer billing analysis

Professional History

- Raftelis: Consultant (2024-present); Associate Consultant (2020-2023)

Education

- Bachelor of Science in Business Administration, Project Management – Elon University (2020)

Certifications

- Microsoft Office Specialist – Excel Certified

KEY PROJECT EXPERIENCE / JOB ASSIGNMENTS FOR OTHER PROJECTS

City of Daytona Beach (FL): Utility Revenue Sufficiency and Rate and Charge Study

TJ has assisted with analysis completed during the Fiscal Year 2020 water and wastewater utility rate study which was prepared during the COVID-19 pandemic. TJ, assisted in the preparation of a capital asset analysis, which was prepared in support of the derivation of impact fee. He also developed a cost vs. benefit analysis which analyzed over 1 million pieces of customer billing and metering data in order to in order to develop a meter replacement prioritization program to assist the City in its meter replacement program.

City of West Palm Beach (FL): Water, Wastewater, and Stormwater Utility Rate Study and Customer Comparative Billing Analysis

TJ has assisted with multiple projects for West Palm Beach including assisting in the analysis of the Stormwater Rate Study. This comprises developing a financial forecast, revenue sufficiency and impact fee evaluation for the water and wastewater system. TJ also assisted with researching rates in the surrounding municipalities for the water, wastewater, and stormwater utility rate study and customer comparative billing analysis.

Newton County Water & Sewerage Authority (GA): Revenue Sufficiency Analysis and Model Update

TJ provided financial analysis of research for the revenue sufficiency analysis and model update for the client.

Hernando County (FL): Water and Wastewater Utility Revenue Sufficiency Analysis Update

TJ completed research for collection fees, plant fees, and rates for the solid waste department. This allowed for a comparative solid waste rate analysis to be conducted for the County. He also performed data input, rolling forward the financial model and evaluating/developing data.

PROJECT LIST

- City of Daytona Beach (FL) – Utility revenue sufficiency and rate and charge study

- Gulf County (FL) – Acquisition evaluation of Lighthouse Utilities Company, Inc.
- Hernando County (FL) – Water and wastewater utility 2021 revenue sufficiency analysis update
- Newton County Water & Sewerage Authority (GA) – Revenue sufficiency analysis and model update
- Village of Wellington (FL) – Building fee evaluation
- City of West Palm Beach (FL) – Water, wastewater, and stormwater utility rate study and customer comparative billing analysis
- Hillsborough County (FL) – Solid waste utility rate study
- Lee County (FL) - Water and wastewater utility 2022 revenue sufficiency analysis update
- City of Sanford (FL) – Water and wastewater Utility rate study
- Islamorada, Village of Islands (FL) – Wastewater rate and system development charge study
- Citrus County (FL) – Septic to sewer analysis
- Oconee County (GA) – Water and wastewater utility rate study

Dwayne Guthrie, PhD, AICP

TRANSPORTATION FEE ANALYSIS QUALITY ASSURANCE / QUALITY CONTROL

Principal Member (DP Guthrie LLC)



ROLE

Dwayne will serve as the lead analyst for the Transportation Fee portion of the study and will work at the direction of Henry Thomas in conducting analyses and preparing deliverables for the project. He will also provide oversight on quality control for the project ensuring it meets both Raftelis and industry standards.

PROFILE

Dwayne is a certified planner that helps public and private sector leaders with the challenges of growth management, infrastructure planning, and funding strategies. He specializes in demographic analysis, capital improvements plans, fiscal evaluations, and consensus building with stakeholders.

For a major portion of his career, Dwayne worked as a planning consultant for cities and counties across America. He directly interacts with top administrators and elected officials regarding best practices for impact fees, infrastructure funding, placemaking, and revenue sources. During the preparation of impact fee programs for approximately 170 local governments in 27 states, Dwayne helped community and government leaders make tough fiscal choices, while successfully managing all aspects of the consulting process.

Dwayne has 40 years of experience (30 years as a planning consultant and 10 years of public-sector planning in Florida). His research interests include quantitative methods, spatial thinking, and smart governance (i.e., the interaction of land use, infrastructure, and funding solutions). Dwayne is currently involved in assisting Raftelis in preparing a municipal impact fee study for the City of Canton, Georgia.

KEY PROJECT EXPERIENCE / JOB ASSIGNMENTS FOR OTHER PROJECTS

As a planning consultant, Dwayne provides comprehensive service from start-up to implementation. Typical assignments require three to six months and include staff interviews, data gathering, technical analysis, report writing, stakeholder meetings, collaboration with community leaders, and presentations at public forums. The following work products provide a representative sample.

Seminole County (FL): Alternative School Impact Fee Study

In 2021, Dwayne teamed with DPGF to produce an Alternative School Impact Fee Study for a mid-rise apartment development to be located in the urban area of Altamonte Springs. We identified comparable sites with unique locational, structural and use characteristics, such as structure parking and smaller apartments with two or less

Years with Firm: 2

Years with Other Firms: 44

Specialties

- Infrastructure planning
- Funding solutions
- Development impact fees
- Demography
- Spatial analysis
- Smart governance

Professional History

- DP Guthrie, LLC (2021-present)
- Raftelis: Manager (2018-2020)
- Manatee County, FL: Impact Fee Manager (2017)
- TischlerBise: Principal (2012-2017); Consultant (1988-2010)
- Catholic University of America in Washington, DC: Associate Professor of Practice (2010-2012)
- Engineering Firm in Tampa, FL: Planner (1987-1988)
- Planning Commission in Tampa, FL: Planner (1979-1987)

Education

- Doctor of Planning, Governance, & Globalization - Virginia Tech (2007)
- Master of Arts in Urban & Regional Planning - University of Florida (1979)
- Bachelor of Arts in Education - University of Florida (1977)

Professional Memberships

- American Institute of Certified Planners (AICP)
- American Planning Association
- Arizona Chapter of the American Planning Association

bedrooms per unit. After obtaining current enrollment data from two School Districts, we derived student generation rates significantly lower than the most recent school impact fee study. Under the adopted fee schedule the school impact fee for the proposed apartments would have been approximately \$4.23 million, compared to the alternative fee of approximately \$1.01 million.

Manatee County (FL): Impact Fee Manager

In 2017, Dwayne worked in the County Administrator's office as the Impact Fee Manager for Manatee County. In 2015, he updated impact fees for parks, law enforcement, and public safety; created a new impact fee for libraries; and significantly revised the existing road impact fee. The multimodal transportation fee includes funding for complete streets (all modes), with unique capital plans and fee schedules by four geographic areas.

City of Corpus Christi (TX): Transportation and Stormwater Impact Fee Studies

As a subcontractor to Raftelis, Dwayne completed transportation and stormwater impact fee studies in 2024. The consultant team collaborated extensively with the mandatory Capital Improvements Advisory Committee. We provided two innovative "policy dials" to fine tune transportation fees and facilitate consensus building. First, we organized capital improvements by functional classification so entire categories of roadways (e.g., two-lane collectors and six-lane arterials) could be easily included or excluded from the fee calculations. Second, we included a revenue credit percentage adjustment, consistent with the state's enabling legislation.

City of Meridian (ID): Impact Fee Development

In 2022 and 2019, Dwayne crafted development impact fees for parks/recreation, police and fire facilities. After collaborating with staff and receiving input from the Impact Fee Advisory Committee, Dwayne recommended several changes to improve consistency with Idaho's enabling legislation, including: 1) updated development projections and land use assumptions based on Meridian data, 2) documentation of current infrastructure standards and projected need for additional facilities, and 3) proportionate fees for two types of non-residential development and five size thresholds for residential development

City of Buckeye (AZ): Fiscal Shortfall Evaluation

In 2020, Dwayne prepared a Fiscal Shortfall Evaluation for Buckeye. After collaborating with staff to understand costs and revenues associated with large-scale, master-planned communities, and holding numerous stakeholder engagement meetings, Dwayne crafted a fiscal shortfall evaluation model that can be used to rigorously evaluate specific development proposals. The Fiscal Shortfall report reviews fiscal impact analysis methods and proposes implementation options for the City to implement the shortfall provision in development agreements.

SPECIALIZATIONS

Impact Fees

Dwayne has completed fee studies on the following types of public facilities: water and sewer systems, roads, schools, parks, fire-rescue, law enforcement, stormwater management, libraries, general government facilities and electric utility systems. Impact fee assignments for private sector clients include successful challenges of fees on behalf of builder/developer associations and independent fee studies for developments with unique characteristics. Dwayne continues to improve "best practices" with customized demographic multipliers by type or size of housing, geographic variation in fees to implement planning policies, and consensus building with private sector stakeholders.

Fiscal Impact Analysis

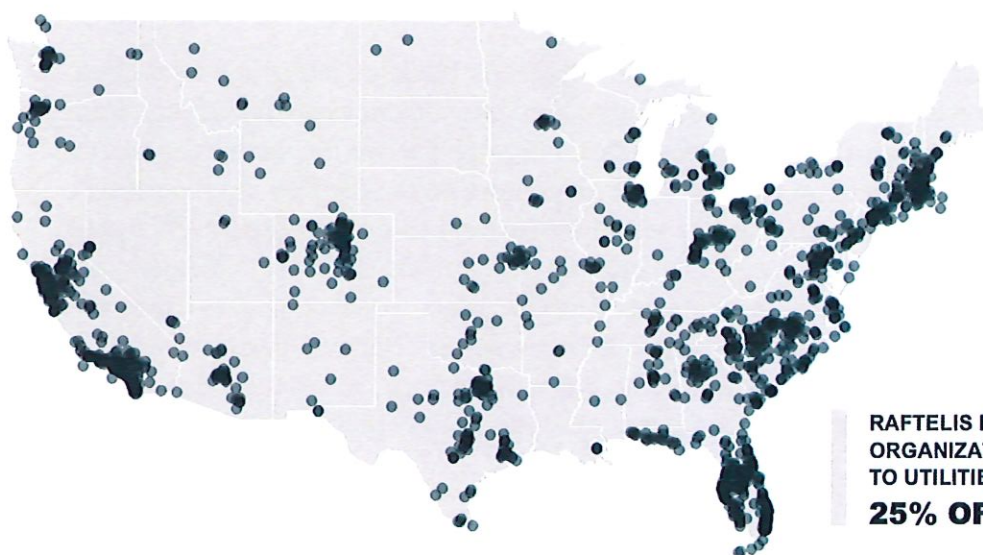
In contrast to impact fees that only consider infrastructure funding, fiscal studies evaluate cash flow to the public sector for all revenues and costs. Dwayne has conducted fiscal evaluations of specific development proposals, alternative development patterns, and various land-use prototypes.

SECTION 3 – PAST PERFORMANCE / EXPERIENCE

Experience

RAFTELIS HAS THE MOST EXPERIENCED UTILITY FINANCIAL AND MANAGEMENT CONSULTING PRACTICE IN THE NATION.

Our staff has assisted more than 1,700 local government agencies and utilities across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis worked on more than 1,300 financial, organizational, and/or technology consulting projects for over 700 agencies in 47 states, the District of Columbia, and Canada. Below, we have provided descriptions of projects that we have worked on that are similar in scope to the City's project. We have included references for each of these clients and urge you to contact them to better understand our capabilities and the quality of service that we provide.



RAFTELIS HAS PROVIDED FINANCIAL/
ORGANIZATIONAL/TECHNOLOGY ASSISTANCE
TO UTILITIES SERVING MORE THAN
25% OF THE U.S. POPULATION.

Holley-Navarre Fire District FL

Reference: Kevin Lewis, Chief

8618 Esplanade St. Navarre, FL 32566 / P: 850.939.5236 / E: chief@hnfd.org

Raftelis was engaged by the Holley-Navarre Fire District (District) to conduct an impact fee study focused on funding fire rescue capital facilities for new development within the District's jurisdiction. The study aimed to update the District's impact fees to ensure that growth-related costs associated with fire protection were adequately recovered. The study included a thorough analysis of the District's level of service (LOS) standards, historical population trends, and projected future development across both residential and nonresidential land uses. Raftelis analyzed the current fire rescue infrastructure, including fire stations, emergency vehicles, firefighting equipment, and personnel levels, to evaluate the existing capacity and identify additional resources needed to support future growth. Key capital improvements, such as the construction of new fire stations and the acquisition of fire apparatus and emergency response vehicles, were incorporated into the fee calculations as well. Raftelis calculated the fire impact fees for different land use categories, reflecting the varying demands placed on fire services by residential,

commercial, and industrial properties. A detailed report was developed to document the study's methodology, assumptions, and recommendations. Raftelis also worked closely with District leadership, conducting public meetings to present the findings and addressing any questions from stakeholders and the community. The updated fire rescue impact fees were successfully adopted by the Fire District's governing board on January 2, 2024.

Project Dates	June 2023 – January 2024
Number of Days	216
Final Report	December 8, 2023
Team Members	Henry Thomas (Project Director), Shawn Ocasio (Project Manager), TJ Speight (Project Analyst)
Meetings	3 Project Status Meetings; 2 Public Meetings for Adoption

City of Lake Alfred FL

Reference: Ryan Leavengood, City Manager

155 East Pomelo Street, Lake Alfred, FL 33850 / P: 863.291.5270 / E: rleavengood@mylakealfred.com

The City of Lake Alfred (City) retained Raftelis 2022 to update the impact fees based on recent and local costs, as well as significant constraints and alternative water needs pursuant to local growth and water availability. Raftelis initially established the City's impact fees in 2018 including the public safety (police and fire services), parks and recreation, public facilities / general government, water, and wastewater impact fees. The City is anticipating significant growth and desired an update to the impact fees to reflect the current costs of providing service along with the ability to reflect the current level of service provided to existing development. In order to maintain a high quality of service, the City has identified future projects and investments necessary to accommodate new growth, which have been reflected in the impact fee calculations. Several alternatives were reviewed for assessing impact fees to growth including a more nuanced approach with an expanded number of land uses versus the simpler approach to administer per square foot of development approach. These fees were successfully presented to and adopted by the City Commission.

Project Dates	March 2022 – December 2022
Number of Days	270
Final Report	December 2, 2022
Team Members	Joe Williams (Project Manager); Michelle Galvin (Project Analyst)
Meetings	3 Project Status Meetings; 2 Public Meetings for Adoption

City of New Smyrna Beach FL

Reference: Natalia Eckroth, CPA, CGFO, Chief Financial Officer at Daytona Beach (formerly at NSB)

301 South Ridgewood Ave, Daytona Beach, FL 32114 / P: 386.671.8063 / E: eckrothnatalia@codb.us

The City of New Smyrna Beach (City) retained Raftelis in 2021 to update the police, fire, and parks and recreation impact fees to reflect the current costs of providing the necessary infrastructure and to meet the demands of growth. The City has unique characteristics in that it is historical a coastal community and is transitioning more towards inland development of annexed areas. The City has a high transient population with significant Airbnb and similar short-term rental situations that are creating increased demands on the City's services, with minor redevelopment activity. This was addressed through the fee calculations as well as updating the cost recovery to match future needs.

Project Dates	May 2021– April 2023
Number of Days	690
Final Report	March 29, 2023
Team Members	Tony Hairston (Project Director); Joe Williams (Project Manager); Michelle Galvin (Project Analyst)
Meetings	4 Project status Meetings; 2 Public Meetings for Adoption

City of Oakland Park FL

References: Andrew Thompson, CGFO, Financial Services Director

3650 N.E. 12th Avenue, Oakland Park, FL 33334 / P: 954.630.4203 / E: andrewt@oaklandparkfl.gov

Raftelis (formerly PRMG) performed an impact fee feasibility analysis for the City of Oakland Park's (City) stormwater, solid waste, police, fire/EMS, library, general government and parks and recreation services in 2017. This feasibility analysis included a review of capital cost information, level of service criteria, typical/hypothetical fee levels, industry standards and norms and typical application methods for stormwater, solid waste, police, fire/EMS, library, general government and parks and recreation impact fees. This analysis then included a review of the type and extent of the City's anticipated development to develop an estimate of potential revenues to assess the potential benefit to the City of implementing the various impact fees. Based on the results of the feasibility analysis, Raftelis then completed a parks and recreation impact fee study for the City. Since the initial study Raftelis performed an update to the City's parks and recreation impact fees which resulted in a successful adoption of the proposed fees revisions in May 2021.

Project Dates	February 2016 – May 2017; November 2020 – June 2021
Number of Days	210
Final Report	May 27, 2021
Team Members	Henry Thomas (Project Manager); Shawn Ocasio (Project Analyst)
Meetings	3 Project Status Meetings; 1 Public Meeting for Adoption

City of Ormond Beach FL

Reference: Steven Spraker, AICP, Planning Director

22 South Beach Street, Room 104, Ormond Beach, FL 32175 / P: 386.676.3341 /

E: steven.spraker@ormondbeach.org

Raftelis was retained by the City of Ormond Beach, FL (City) to prepare a comprehensive analysis to update its water and wastewater utility connection fees as well as its parks and recreation, stormwater, and transportation (local roads and mobility fees) impact fees for the City. To accomplish this project, Raftelis teamed with a transportation engineering consultant and an impact fee attorney in order to accomplish the transportation impact fees and provide legal assistance to the City. The study included a review of the City's level of service (LOS) standards for all utility and municipal services, an analysis of historical population and projection of population and dwelling units, and an evaluation of existing and future capital investment available to serve new growth. Proposed Impact fees were then developed based on a functional population style approach for residential and nonresidential property types. The study also included a feasibility analysis to assess whether the City could reasonably implement new police and fire impact fees. Upon completion of the feasibility analysis, Raftelis then developed police and fire implementation. Raftelis also assisted in the review of the draft impact fee ordinances prepared by the City's legal counsel and attended public workshops and hearings with the City Commission to discuss the fee analysis, major

observations and assumptions, fee application methodologies, and proposed impact and connection fees. The study's recommendations were successfully adopted by the Commission.

Project Dates	July 2021 – March 2023
Number of Days	600
Final Report	March 29, 2023
Team Members	Tony Hairston (Project Director); Shawn Ocasio (Project Manager); Michelle Galvin (Project Analyst)
Meetings	4 Project Status Meetings; 2 Public Meetings for Adoption

City of Sanford FL

Reference: Cynthia Lindsay, Finance Director

300 North Park Avenue, Sanford, FL 32771 / P: 407.688.5026 / E: cynthia.lindsay@sanfordfl.gov

Raftelis updated the City of Sanford's (City) police and fire impact fees in order to represent current costs and to develop fees by various non-residential land uses. The Raftelis project manager has over a decade of experience managing projects for the City of Sanford. These projects have included numerous impact fee, utility rate and revenue sufficiency studies. Impact fee studies have included water and sewer impact fees and municipal impact fees. The original police, fire, and recreation impact fee study involved the coordination of five City departments plus the City Manager's office in order to complete the data and policy review. A kick-off meeting was held to collaborate with the various department leaders and staff involved with the project. At the kick-off meeting, certain assignments and project goals were established including the City's commitment to meeting the level of service targets for police, fire, and recreation services. During the review of capital improvements plan the growth-related allocations of planned projects were determined including the City's planned construction of a public safety building in order to meet the growing needs of police and fire services by the community. Detailed fixed asset records including equipment and facilities were reviewed to determine existing versus growth related allocations and existing service levels. Various open space and recreation land uses were reviewed to determine actual versus planned level of services, with adjustments to account for investments needed to meet existing service level deficiencies. The various municipal impact fee recommendations were summarized in a report submitted to the City and presented to the City Commission. The recommended fees were adopted by the Commission in 2008 and updated in 2010. These fees were updated in 2014 and in 2021.

Project Dates	January 2021 – September 2021
Number of Days	270
Final Report	August 30, 2021
Team Members	Joe Williams (Project Manager); Michelle Galvin (Project Analyst)
Meetings	3 Project Status Meetings; 2 Public Meetings for Adoption

City of Clermont FL

Reference: Scott Davidoff, CPRP (Deputy City Manager)

685 W. Montrose Street, Clermont, FL 34711 / P: 352.241.7358 / E: sdavidoff@clermontfl.org

Raftelis, previously Public Resources Management Group, Inc. (PRMG), has provided utility rate and municipal impact fee analyses, impact fee studies, and utility rate studies to the City of Clermont (City) since 2004. In addition to developing a utility and municipal impact fee analysis in 2004 and 2012, we assisted the City with a comprehensive water, wastewater and municipal impact fee study in 2023.

To assist the City of Clermont in planning for the utility system's future financial needs. The analyses include:

- Developing detailed customer and usage forecast and billing profiles
- Identifying net revenue requirements of the System and allocation of costs among utilities
- Developing a detailed capital improvement project funding analysis and a corresponding flow of funds evaluation
- Evaluating compliance with rate covenants and financial targets
- Developing rate adjustment recommendations and assisting in drafting of revised rate resolution
- Highlights of the rate study services will include:
- Establishing new rate structures to significantly improve water conservation price signals and equity among customer classes
- Designing new impact fees to recover cost of capacity from new development for police, fire and recreation services. Based on Florida statutes the impact fees were fully adopted by the City based on a finding of extraordinary circumstances

Project Dates	June 2022 - June 2023
Number of Days	365
Final Report	May 5, 2023
Team Members	Henry Thomas (Project Director), Murray Hamilton, CPA, & Shawn Ocasio (Project Managers); Michelle Galvin (Project Analyst)
Meetings	4 Project Status Meetings; 3 Public Meetings for Adoption

City of Bartow FL

Reference: David Wright, Director of Finance

450 N. Wilson Avenue, Bartow, FL 33830 / P: 863.534.0100 / E: dwright.finance@cityofbartow.net

Raftelis was recently selected by the City of Bartow (City) to update the utility rates and charges for the City's water, sewer, sanitation and stormwater systems as well as utility impact fees and Police, Fire, Parks and Recreation, Transportation and Public Facility Impact Fees. The enterprise rates hadn't been adjusted since 2015 and required significant rate increases phased in over a five-year period. In addition to proposed monthly utility rates and water and sewer impacts fees and municipal impact fees for police, fire, public facilities, transportation and parks and recreation service were also developed and successfully adopted by the City. This included adoption of a new Police Impact Fee.

The municipal impact fees were fully adopted based on the requirements of Florida Statutes related to Extra Ordinary Circumstances which required two additional Public Hearings

Project Dates	July 2022 - July 2024
Number of Days	720
Final Report	February 8, 2024
Team Members	Henry Thomas (Project Director), Joe Williams & Shawn Ocasio (Project Managers), Michelle Galvin, TJ Speight and Tristen Townsend (Project Analysts)
Meetings	6 Project Status Meetings; 4 Public Meetings for Adoption

City of Lake Wales FL

Reference: Autumn Cochella, Development Services Manager, Department of Planning & Development
201 West Central Avenue, Lake Wales, FL 33853 / P: 863.678.4182 ext. 229 / E: acochella@lakewalesfl.gov

Water and Wastewater Rate Study

The City of Lake Wales (City) engaged Raftelis Financial Consultants to provide a rate structure analysis and utility revenue sufficiency study. A multi-year revenue sufficiency model was developed to provide the City with a dynamic planning tool to evaluate various capital improvement initiatives. Raftelis used the revenue sufficiency model to develop “real-time” scenario analysis during meetings with City management to develop a funding plan to address capital needs.

Financial indicators and targets were developed to guide decision making and establish benchmarks for revenue sufficiency. Debt service coverage targets were used to assist the City in identifying the financial feasibility of issuing additional debt. Raftelis worked with the City to coordinate an optimum funding and rate strategy to present to the City Commission. The results and recommendations of the revenue sufficiency study were presented to the City Commission. The recommendations included substantial across-the-board rate adjustments that would be necessary for the City to proceed with certain utility capital improvements. Based on the information presented by Raftelis to the Commission during a public workshop, the indicated rate adjustments were subsequently adopted and implemented in October 2015. Raftelis also coordinated with City staff on appropriate customer notification pursuant to Florida Statutes.

Utility and Municipal Impact Fee Study

Raftelis recently provided the City with a utility and municipal impact fee study that concluded in September 2020. The studies included the development of water, wastewater, police, fire, recreation and library impact fees. The results of the municipal impact fee study were based on the City’s level of service standards, historical facility costs, and the planned facility expenditures identified in the City’s capital plan.

Project Dates	October 2019 – October 2020
Number of Days	390
Final Report	October 23, 2030
Team Members	Shawn Ocasio (Project Manager)
Meetings	4 Project Status Meetings; 2 Public Meetings for Adoption

[illegible]

SECTION 4 – PROJECT COST

Project Cost

The following table provides a breakdown of our proposed fee for this project. This table includes the estimated level of effort required for completing each task. Expenses include costs associated with travel and other direct expenses associated with the project.

Our scope of work includes the number of in-person and/or virtual meetings shown in the table below. Should the City require additional meetings or presentations to stakeholders, these can be arranged upon request at an added cost, which will be determined based on the scope and content of the meeting and the services requested.

Tasks	Number of Onsite Meetings	Hours								Total Fees & Expenses
		HT	SO	MG	TS	JW	DG	Admin	Total	
1. Prepare Data Request/ Kick-off Meeting	1	4	5	2	0	0	4	1	16	\$4,955
2. Review of Existing Impact Fee Methods and Policy Review		1	1	4	0	0	2	0	8	\$2,180
3. Data Gathering and Review		0	8	16	0	0	4	0	28	\$7,680
4. Service Area Forecast		0	4	8	16	0	4	0	32	\$7,920
5. Review Level of Service Standards and Cost Allocation		2	26	20	40	2	8	0	98	\$26,320
6 - 7. Design of Impact Fees and Fee Comparisons	1	4	18	20	8	4	12	0	66	\$18,755
8 - 9. Review Impact Fee Ordinance and Presentation of Findings	4	16	34	32	4	0	16	8	110	\$32,140
Total Estimated Meetings / Hours	6	27	96	102	68	6	50	9	358	
Hourly Billing Rate		\$400	\$340	\$260	\$230	\$340	\$200	\$100		
Total Professional Fees		\$10,800	\$32,640	\$26,520	\$15,640	\$2,040	\$10,000	\$900	\$98,540	

HT - Henry Thomas
SO - Shawn Ocasio
MG - Michelle Galvin
TS - TJ Speight
JW - Joe Williams
DG - Dwayne Guthrie

Total Fees \$98,540
Total Expenses \$1,460
Total Fees & Expenses **\$100,000**

SECTION 5 – REFERENCES

References

We urge you to contact the references listed below to better understand our capabilities and the quality of service that we provide.

Holley-Navarre Fire District FL

Kevin Lewis, Chief
8618 Esplanade St. Navarre, FL 32566 / P: 850.939.5236 / E: chief@hnfd.org

City of Lake Alfred FL

Ryan Leavengood, City Manager
155 East Pomelo Street, Lake Alfred, FL 33850 / P: 863.291.5270 / E: rleavengood@mylakealfred.com

City of New Smyrna Beach FL

Natalia Eckroth, CPA, CGFO, Chief Financial Officer at Daytona Beach (formerly at NSB)
301 South Ridgewood Ave, Daytona Beach, FL 32114 / P: 386.671.8063 / E: eckrothnatalia@codb.us

City of Oakland Park FL

Andrew Thompson, CGFO, Financial Services Director
3650 N.E. 12th Avenue, Oakland Park, FL 33334 / P: 954.630.4203 / E: andrewt@oaklandparkfl.gov

City of Ormond Beach FL

Steven Spraker, AICP, Planning Director
22 South Beach Street, Room 104, Ormond Beach, FL 32175 / P: 386.676.3341 /
E: steven.spraker@ormondbeach.org

City of Sanford FL

Cynthia Lindsay, Finance Director
300 North Park Avenue, Sanford, FL 32771 / P: 407.688.5026 / E: cynthia.lindsay@sanfordfl.gov

City of Clermont FL

Reference: Scott Davidoff, CPRP (Deputy City Manager)
685 W Montrose St, Clermont, FL 34711 / P: 352.241.7358 / E: sdavidoff@clermontfl.org

City of Bartow FL

Reference: David Wright, Director of Finance
450 N. Wilson Avenue, Bartow, FL 33830 / P: 863.534.0100 / E: dwright.finance@cityofbartow.net

City of Lake Wales FL

Reference: Autumn Cochella, Development Services Manager, Department of Planning & Development
201 West Central Avenue, Lake Wales, FL 33853 / P: 863.678.4182 ext. 229 / E: acochella@lakewalesfl.gov

SECTION 6 – PROJECT APPROACH

Project Approach

The City is seeking a comprehensive impact fee study to review its municipal impact fees including transportation, parks, law enforcement, and fire/rescue services to ensure proper recovery of expansion related capital costs for each service from new development. The need for capacity to serve growth is generally the result of new development and redevelopment of existing properties. As significant development and redevelopment is expected to continue for the City, a review of the capacity needs for municipal facilities and the related costs incurred to provide them should be undertaken periodically. Through this exercise the City will be able to establish valid impact fees based on the appropriate level of service for each area of municipal service and the cost for each unit of new development to maintain this level of service as the City continues to grow.

As a source of capital funding, impact fees have certain restrictions established under State law and must not be combined with general government revenues, such as sales and property taxes. Impact fees are one-time charges to new development for specific public infrastructure that benefits new development. In contrast to specific project-level improvements, impact fees fund growth-related infrastructure that benefit multiple development projects, or the entire jurisdiction (generally referred to as system improvements). Impact fees are intended to proportionately allocate infrastructure costs to all types of new development. The impact fee methodology depends primarily on the timing of infrastructure construction (past, concurrent, or future) and service characteristics of the type of development being addressed. Also, consideration of “credits” is integral to the development of a legally defensible impact fee study. In addition, impact fee revenues must be used to fund the type of infrastructure for which the fee is designed to collect, while providing a timely and measurable benefit to new development.

Raftelis’ team will help the City update its existing impact fees and to recover the growth-related share of infrastructure costs for the various municipal services, thus mitigating the funding burden on existing taxpayers. Raftelis has a unique offering the City can leverage for success with the ability to provide local and national knowledge and perspective for this project.

IMPACT FEE BACKGROUND

An impact fee is a charge imposed on new users of real property to help finance the capital cost of municipal services necessary to serve new development. The purpose of an impact fee is to assign, to the extent practical, growth-related capital costs to those new residents or users responsible for such additional costs. The impact fee is considered to be a new user’s contribution to capital costs that are required for facilities and certain equipment in order to provide a comparable level of service capacity to that which is being provided to existing customers.

IMPACT FEE CRITERIA

To the extent new population growth and associated development imposes identifiable capital costs that increase the capacity of municipal service facilities, those costs should be recovered from the residents or system users responsible for the costs rather than the existing population base. Generally, this practice has been labeled as “growth paying its own way.”

Florida Statutes and Florida case law identifies certain conditions for a valid impact fee imposed by municipalities. Generally, these conditions involve the following issues:

1. The impact fee must meet the “dual rational nexus” test. First, impact fees are valid when a reasonable connection or rationale exists between the anticipated need for additional capital facilities and the growth in

population. Second, impact fees are valid when a reasonable association, or rational nexus, exists between the expenditure of the impact fee proceeds and the benefits accruing to new development from those proceeds.

2. The system of fees and charges should be set up so that there is not an intentional windfall to existing users.
3. The impact fee should, to the extent practical, only cover the capital cost of construction and related costs thereto (engineering, legal, financing, administrative, etc.) for capital expansions or other capital requirements that are required solely due to growth. Therefore, expenses due to upgrading of a facility serving existing customers (e.g., replacement of a capital asset) or an increase in the level of service should be borne by all users of the facility. Likewise, increased expenses due to operation and maintenance of that facility should be borne by all users of the facility.
4. Impact fee revenue should be set aside in a separate account, and separate accounting must be made for those funds to ensure that they are used only for the lawful purposes described above.

Based on the criteria above, impact fees should: i) include only the estimated capital cost of facilities and equipment necessary to serve anticipated new development; ii) reflect only an allocated portion of costs associated with improvements of existing capital assets of the City; and iii) should not include any costs of operation and maintenance of any facilities, including those facilities financed in part with impact fees.

Florida Statutes provide for additional criteria in the design of impact fees. Section 163.31801 of the Florida Statutes further provides that an impact fee adopted by ordinance of a county or municipality or by resolution of a special district must, at a minimum:

1. Require that the calculation of the impact fee be based on the most recent and localized data.
2. Provide for accounting and reporting of impact fee revenues and expenditures in a separate accounting fund.
3. Limit administrative charges for the collection of impact fees to actual costs.
4. Require that collection of the fee cannot occur before the issuance of a building permit.
5. Require that notice be provided no less than ninety (90) days before the effective date of an ordinance or resolution imposing an increase in impact fees.
6. The impact fee study must be adopted within twelve (12) months of initiating the study.

Additionally, the Florida Impact Fee Act requires that audits of financial statements of local governmental entities and district school boards that are performed by a certified public accountant pursuant to Florida Statute 218.39, submitted to the Auditor General, must include an affidavit signed by the chief financial officer of the local governmental entity or district school board stating that the local governmental entity or district school board has complied with this section.

GENERAL PROJECT APPROACH

Our project approach has been developed through years of experience and we follow industry standard methods applied specifically to the City's unique characteristics to ensure fair and equitable impact fees that are defensible and meet the needs of the City.

Our Team's approach is based on our understanding of the major objectives to be accomplished by the study that are as follows:

1. Determination of projected demands and capital needs of the City to fund growth-related transportation, parks, law enforcement and fire/rescue requirements.
2. Determination of reasonable level of service standards for the development of impact fees consistent with the City's comprehensive plan information and requirements, industry standards, and current service levels provided by the City.

3. Development of impact fee rate structures taking into account the estimated capital costs associated with municipal services' capacity needs, other available funding sources, and the classes of customers for which the fees will be applied (i.e., single family residence, multi-family residence, commercial by class, etc.). The model used to develop the impact fee analysis will be in Microsoft Excel and will be shared in interactive review sessions with the City.
4. Assistance in updating the draft impact fee ordinances to adopt the proposed impact fees and associated administrative procedures associated with implementation such as phasing in fees or implementation via the extraordinary circumstance provisions of the Florida Statutes.
5. Documentation and presentation of the study results to the City's staff and City leadership. The briefing documents used in the public presentations will be designed in Microsoft PowerPoint and the narrative report will be developed in Microsoft Word and transmitted in PDF format.

PROJECT MANAGEMENT APPROACH

We believe that the City's impact fees should be consistent with management's goals, the existing capital planning process, financial information systems and operating data, and the project goals and objectives and criteria outlined previously in this section. The critical nature of the consultant's role will require a project team capable of coordinating with City staff to resolve questions related to impact fee issues, such as:

- Existing investment in capital facilities and future capital funding plans
- Level of service requirements
- Service categories and attributes
- Fee structures by customer classification or property type
- Implementation considerations

Our approach to providing the proposed consulting services will place a major emphasis on the coordination and communication elements of the study process. The key to successfully completing the scope of services and meeting the project deadlines is to start with a well-conceived project plan with clearly delineated tasks and deliverables, properly manage the resources necessary to complete the study, effectively coordinate our team's activities with the City, and maintain clear lines of communication with the City's project team. Regarding communication, Raftelis will set up periodic check-in calls and updates with the City's team to provide information as to the project status and next steps. In addition to these regularly scheduled calls, Raftelis will also provide the City's project team with email and phone contact information to ensure that the City can reach out regarding meetings, general communications, project coordination and general supervision. We ensure accessibility by operating at a company-wide project utilization of approximately 65% to 75%. This level of utilization, which also reflects the project team's availability, is expected to continue through the proposed timeline of this project. The project team's current workload will allow ample time to successfully complete the City's engagement.

In the proposed impact fee study work plan, we have made allowances for meetings with City staff throughout the study to develop and review study assumptions and results. The work plan also includes attendance at public meetings to present the study results to the City Commission.

Experience has taught us to perform impact fee studies in a series of phases. We have found this approach to be very successful in meeting the needs of our clients. We believe a phased approach to the work plan will enhance the coordination efforts of our project team and City staff for the following reasons:

1. A phased approach allows City staff to get involved in the fundamental planning assumptions and analysis at various points throughout the study, and to continuously monitor the study progress, which is critical to the timely completion of the rate study project.

2. It allows City staff to provide more effective input to the study process with respect to strategic decisions, and to affirm that the study is on course and consistent with the City's policies, goals, and objectives, thus ensuring a successful project.
3. It allows City staff members to fully understand and review the individual study components and promotes a more effective public information program.
4. It results in a cost-effective project as each phase builds on the results of the prior phase.

Our approach also includes project management and quality control steps to ensure that study results are reasonable, achieved cost effectively, and on schedule. A detailed study schedule will be developed in conjunction with the City's staff. The schedule will be reviewed by the project manager on an ongoing basis and updated, as required, to keep track of study progress. Scheduling problems, corrective measures and adjustments, as necessary, will be coordinated with City staff as they occur. Additionally, a detailed cost estimate by study task will be prepared for each specific project phase and task. The cost estimate will be used to track actual project costs and will be reviewed monthly to ensure project cost control.

Generally, in these types of studies, the major issues and problem areas include identifying proper service categories, and establishing a reasonable basis for a fair apportionment of the costs for the service categories based on level of service considerations. We propose dealing with these issues through detailed discussions with the City's planning and finance staff about future development and land uses, experience and problem areas associated with implementing the current fee schedule, development of appropriate alternative fee application methods, and the use of empirical data and accepted industry standards to support our recommendations.

PUBLIC ENGAGEMENT AND STAKEHOLDER INVOLVEMENT

Providing an effective public outreach process lends credibility and transparency to any communications effort. Raftelis is experienced in assisting clients develop public involvement efforts that engage the public and encourage meaningful exchange of information.

When engaging the public on complex initiatives it's challenging to help stakeholders understand the issues let alone motivate them to participate. Building on your existing outreach efforts we look to expand and ensure that the public participation and outreach developed for your projects aligns with past approaches and preferences.

In order to facilitate public engagement, Raftelis will first ensure that the City's internal project team is adequately briefed on all major assumptions throughout the course of the project. This will ensure that as questions are posed to the City's team by the public and executive leadership during the course of the project, they will be able to convey the relevant information accurately and confidently. An important part of our project management approach is regular virtual briefings with the City's project team during all stages of the project in order to keep all major participants informed of the latest information and overall status as well as to receive input from the City. As recommendations and an implementation plan are developed, Raftelis will work with the City's project team to develop a plan for public notification and involvement. Generally, we recommend that the City first have a public workshop to address the assumptions, analyses, and results and recommendations of the study in order to allow the public and City Commission to provide feedback and comments. This initial workshop should be publicly noticed in the newspaper as well as on the City's website and social media outlets to ensure public attendance and involvement. These workshops can encourage stakeholders to bring questions and ask subject matter experts questions about the study and recommendations thereby increasing engagement. We also find that one-on-one meetings with the members of a City Commission can be very beneficial as they allow for the Commission members to ask additional questions and engage in a more in-depth dialogue than what may be done in a public forum workshop due to time constraints not being a factor. These sessions allow the elected officials to better understand the issues, get in-depth explanations and answers to their questions. Meetings with the development community can

also be very productive as they allow those who will likely be most impacted by any changes in impact fees to provide their feedback and concerns to the elected officials and project team. These sessions allow the community to feel more confident that their input has been incorporated into the decision-making process. The next steps would be conducting meetings during regularly scheduled Commission meetings associated with the adoption of the proposed fees. It is important to bring the public and stakeholders along for each step of the approval process to make sure all opinions are heard.

PROPOSED PROJECT SCOPE

The following project approach, described in detail below, is proposed to accomplish this project for the City. The task listing has been structured and ordered in the general manner that our team approaches these types of studies but has also been linked back to the tasks listed in the City's RFP. We have had great success with this project approach in many of our team's efforts historically and believe it would be well suited to accomplish the City's goals and objectives.

Task 1 – Prepare Data Request/Kick-off Meeting

The initial task will include preparation of a data request to identify the information to be provided by the City. This task will also include a project kick-off meeting to discuss project goals and objectives, data concerns, impact fee methods, administrative issues, and to finalize the project schedule.

Task 2 – Review of Existing Impact Fee Methods and Policy Review

This task includes evaluating current impact fee structures and fee application methods. We will work closely with City staff to address administrative concerns and identify areas of improvement related to customer service/land use categories and application methods and alternatives. This task will also include reviewing existing fee ordinances and application methods and identifying potential changes and improvements. By conducting this review process early in the project, the fees can be tailored to achieve policy objectives.

Task 3 – Data Gathering and Review

This task will be based on i) interviews with City staff (transportation, parks, law enforcement and fire/rescue, public works, finance, planning, and other departments) and ii) review of the data compiled and provided by the City in response to the data request prepared in Task 1. Data that will be requested will include: i) fixed asset records; ii) level of service standards; iii) capital projects, equipment, and facilities required to provide the relevant municipal services; iv) population estimates and projections; v) comprehensive and master planning data; and vi) any other data and information considered necessary to adequately perform the study.

Task 4 – Service Area Forecast

An evaluation of the current service area demographics, population and employment, as well as a forecast of the service area needs, will be reviewed based on data available to Raftelis. Specifically, a review of the population forecast by type of dwelling unit (e.g., single-family, multifamily, etc.) and commercial development by land use type, if available (including the square footage of such developments located within the City and planned for the City), will be reviewed.

A review of the population projections and other service area demographics as contained in such documents as the City's Comprehensive Land Use Plan; Florida Statistical Abstract; other information provided by the Bureau of Economic and Business Research, University of Florida; data made available by the City's Planning Department;

and other such information will be relied upon. The purpose of this task is to identify the future service area demands for each service and to estimate the capital requirements (level of service relationship) required for the fair share cost apportionment of such costs to future growth. This task will include development of a functional population estimate for the various commercial land uses that we will use in the cost allocation and fee design tasks. This task will also include utilizing trip generation data by land use.

Task 5 – Review Level of Service Standards and Cost Allocation

The capital costs associated with meeting the relevant service requirements for new customers will be identified. These costs will be allocated among the various departments and also residential and commercial customer classifications, where appropriate. The allocation of such costs will be based on the service area demographics, level of service considerations, and development characteristics of the City, and other factors as deemed appropriate by Raftelis and the City. This task will include a meeting to discuss assumptions and allocation methodologies.

Task 6 – Design of Impact Fees

The various impact fees will be calculated for a unit of service recognizing the utilization of capacity by an equivalent residential unit (e.g., single family residential), and will reflect the City's capital cost to serve such new development. This task will include the following:

- Review of and, if appropriate, recommended changes to the City's current impact fee application methodology.
- Identification of appropriate impact fee methodology including the cost of constructing expansion related capital improvements (Incremental or Marginal Cost method) or capital costs of existing facilities with capacity available to serve new development (System Buy -In) or a combination of both methods, where appropriate.
- Identification and analysis of existing facility costs based on asset or property records and expansion related costs based on the City's capital improvement program to provide municipal services to future service area needs for a multi-year planning horizon.
- Evaluation of existing service capacity utilization relationships and capacity additions.
- Review and development of billing classification and equivalent residential unit requirements, as necessary.
- Review of level of service standards for municipal services.
- Work closely with City staff to determine a method of developing a multi-modal “mobility” fee throughout the City or in special geographic areas.
- Calculate revised municipal impact fees based on full cost recovery for police, fire, rescue, and parks and recreation.
- Analyze the feasibility of implementing potential new impact fees for and provide recommendations as to potential pursuit of said fees such as mobility fees.
- Meeting with staff to review preliminary and revised impact fee designs and obtain comments.

Task 7 – Impact Fee Comparisons

A comparison of the City's existing and proposed municipal impact fees for an equivalent residential unit and commercial development will be made with similar fees charged by other neighboring jurisdictions.

Task 8 – Review Impact Fee Ordinance

Raftelis' team will assist the City in reviewing and updating the municipal impact fee ordinances. The review of the ordinances may include issues such as the level of fees charged per unit of service and methodology for application, allowance for alternative methods of calculation, and establishment of a fund for the use of monies as considered necessary for the adoption of the fee.

Task 9 – Presentation of Findings

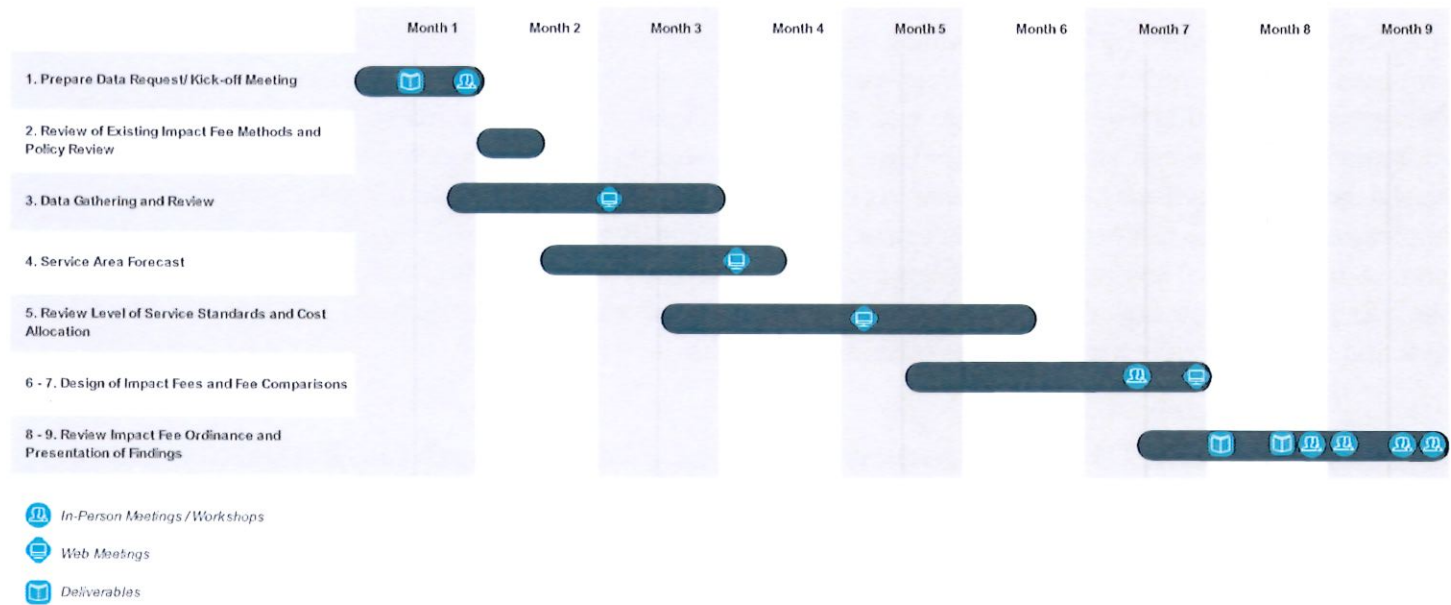
A report will be prepared by Raftelis detailing the data and assumptions relied upon in the development of the proposed municipal impact fees, the analyses performed relative to the derivation of such fees including supporting documentation that addresses compliance with the State of Florida's Impact Fee Act and our conclusions and recommendations for consideration by the City. It is anticipated that a draft report will be prepared for consideration and review by City staff prior to presentation to the City Commission for consideration, adoption and implementation. This task will include in person physical attendance of four public meetings with the City to present draft and final reports. We will tailor the City Commission presentations to address the key objectives of the study and demonstrate how the proposed impact fees are defensible and reasonable based on recent and localized data and compare the proposed fees with other municipalities.

Optional: Task 10 – Implementation of Fees Based On Extraordinary Services

The Florida Impact Fee Act places limitations on the local governments ability to increase impact fees. Currently the Statute requires that increase up to 25% must be phased in over a two year period. Increases above 25% are capped at a 50% increase, which must be phased in over four years. Further, Impact Fee Studies to support fee increases can only be conducted every four years. Due to the impact of high construction cost inflation and growth requiring significant new capacity additions, the Statute does allow for an exception to the fee increase limitations to avoid overburdening existing taxpayers to meet the capacity needs of new growth. To increase impact fees beyond the statutory limits the local government must hold two additional specific public hearings to demonstrate a finding of extra ordinary circumstances that must meet certain criteria and the proposed extraordinary increases must be adopted unanimously. Based on the outcome of the impact fee study, the City may wish to pursue this option.

Schedule

Raftelis will complete the scope of services within nine (9) months from the notice-to-proceed as shown in the schedule below. Based on the requirements of the Impact Fee Act, the City is required to adopt the new fees within one (1) year from initiation of the study.



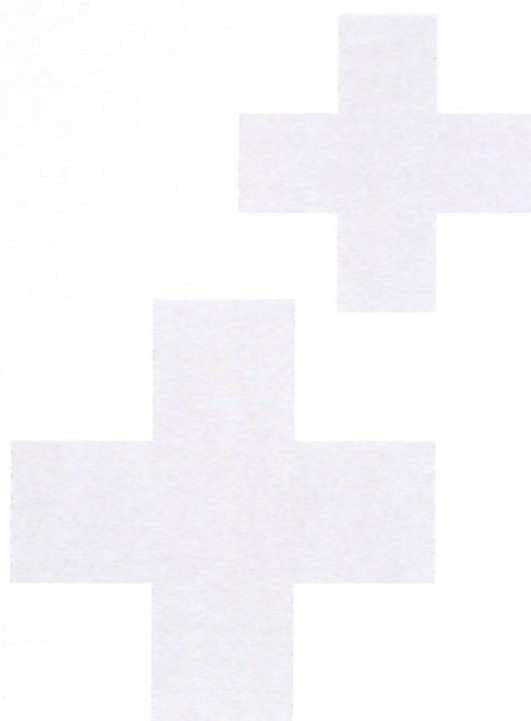
SECTION 7. PROPOSAL OF NEW IMPACT FEE STUDIES

Proposal of New Impact Fee Studies

For information on our team's experience proposing new Impact Fee schedules, supporting methodology, and technical support of the Impact Fees, please see the project summaries in Section 3: Past Performance/Experience.

APPENDIX: FORMS

Appendix: Forms



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CITY OF DELTONA

FIRM INFORMATION FORM

The information below is required to complete your bid packet. Type or print only.

Company Name: Raftelis Financial Consultants, Inc.

Address: 341 N. Maitland Avenue, Suite 300

City: Maitland

State: FL

Zip Code: 32751

Phone Number: 407.960.1811

Fax Number: 828.484.2442

Project Contact: Henry Thomas

e-mail address: hthomas@raftelis.com

Remittance (Payment) Mailing Information

Address: Raftelis Financial Consultants, Inc., PO Box 96261

City: Charlotte State: NC Zip Code: 28296-6261

Phone Number: 704.373.1199

Fax Number: 828.484.2442

Project Contact: Jessica Jasso

e-mail address: jjasso@raftelis.com


Federal Tax ID No.: 20-1054069

Tax ID Type: Federal Tax ID Social Security Number

This Form Must Be Completed and Returned with your Submittal.

**ATTACHMENT
“A”**

Addendum Acknowledgment

<p>Acknowledgment is hereby made of receipt of addenda issued during the solicitation period.</p> <p>RFP#25017</p>	<p>Addendum # <u>1</u> through # <u>3</u></p> <p>Initial: HT</p> <p>Date: 7/3/2025</p>
<p>Person Completing RFP (Signature)</p> 	
<p>Name (Printed):</p> <p>Henry Thomas</p>	<p>Title:</p> <p>Senior Vice President</p>

>>>Failure to submit this form would have a negative impact on your evaluation score<<<



ADDENDA #1 TO BID#25017

Comprehensive Impact Fee Study for Transportation, Parks, Law Enforcement and Fire/Rescue

June 4, 2025

TO ALL BIDDERS: You are requested to make all changes and/or additions contained in this Addendum to the Bidding Documents. Failure to acknowledge this Addendum in Proposal shall result in rejection of bid.

BID DATE AND TIME SHOULD CORRESPOND TO DATE AND TIME INDICATED IN ADVERTISEMENT FOR BIDS, UNLESS DATE AND TIME HAS BEEN CHANGED IN THIS OR PREVIOUS ADDENDUMS.

CHANGE TO SCOPE - Page 5 – Project Objectives Verbiage Addition:

Project objectives. The City's primary objective for this project is to obtain a basis for adoption of a development impact fee schedule that reflects the capital costs of providing services to new development. The project entails updating the City's development impact fee study which provides the basis and rational support for the development impact fee schedule. Development impact fees covered in the study are: parks, libraries, fire, and police, transportation. In addition to development impact fees, the project will also evaluate the City's Business Tax Receipt (BTR) fees and explore the potential implementation of a Certificate of Use program as a replacement or complement to the existing BTR system.

1. This addendum is to **replace page #5** with the attached new page #5

I hereby confirm that I am authorized to submit this bid on behalf of

Raftelis Financial Consultants, Inc.

Company Name

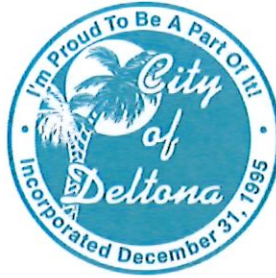
Henry Thomas

Representative

6/3/2025

Date

This Form Must Be Completed and Returned with your Submittal.



ADDENDUM #2 TO RFP #25017
COMPREHENSIVE IMPACT FEE STUDY FOR TRANSPORTATION, PARKS, LAW
ENFORCEMENT AND FIRE/RESCUE
June 9, 2025

1. This Addendum is to **RESCIND ADDENDUM #1**.

This Form Must Be Completed and Returned with your Submittal.

I hereby confirm that I am authorized to submit this addendum on behalf of:

Raftelis Financial Consultants, Inc.

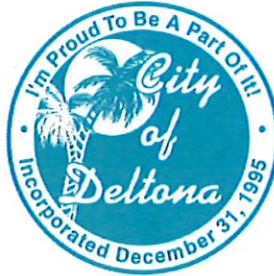
Company Name

Henry Thomas

Representative

6/3/2025

Date



ADDENDUM #3 TO RFP #25017
COMPREHENSIVE IMPACT FEE STUDY FOR TRANSPORTATION, PARKS, LAW
ENFORCEMENT AND FIRE/RESCUE
June 18, 2025

This Addendum is to clarify the following:

1. Could you please confirm if library fees are to be included in the study?

Library fees are handled through Volusia County and are not administered by the City. As such, they do not need to be included in the scope of the study.

2. Would the City like bidders to identify requested contract edits to a sample/model contract? If so, could the sample contract please be provided? (ASK DEBBIE FOR A SAMPLE CONTRACT)

See Sample Contract Attached

3. In section 2 (Qualifications of Staff), there is a second set of parameters listed b through e, beginning with "proposal of new impact fee schedules." Are these intended to be under this section, or should they be included in References or Past Performance/Experience?

Place in Performance / Experience

4. Per the scope of work in the RFP, "development impact fees covered in the study are: parks, libraries, fire, and police, transportation." However, library fees are only mentioned in one instance in the scope of work, but not in the title. Could you please confirm if library fees should be included in the requested study?

Library fees are handled through Volusia County and are not administered by the City. As such, they do not need to be included in the scope of the study.

5. I would like to submit the following questions concerning the City of Deltona's RFP for Comprehensive Impact Fee Study for Transportation, Parks, Law Enforcement and Fire/Rescue:

- These bullet points don't seem to fit in Section 2 Qualifications of Staff. Are they

supposed to be there? If so, how would the City like to see this information addressed in this section?

b. Proposal of new Impact Fee Schedules;

Please include this under a new tab titled "Proposal of New Impact Fee Schedules" within your submission.

c. Update/Creation of the technical support of the Impact Fees;

This can also be included in the new tab focused on the proposal of the of the new fee schedule and supporting methodology.

d. Evaluation for the jurisdiction that included reporting of Transportation, Parks, Law Enforcement Service or Fire/Rescue Impact Fee Schedules;

This item can be discussed in Section 3 – asking whether firm has previously evaluated a jurisdiction's impact fee structure and provided formal reports. If so, please summarize that experience and the outcome.

e. The jurisdiction took affirmative action, based on the reports generated by the study, to effect adjustments to or creation of the technical support or the fee schedule for impact fees.

This item can be discussed in Section 3 – Whether any of your studies led to actual changes or updates adopted by the jurisdiction. Please describe any such examples as part of your response.

- Section 3: Past Performance/Experience requests three projects, along with contact information for the client. Section 5: References requests five references. Can we use the same three references in Section 5 that are used in Section 3, or should Section 5 have five different references?

Yes, you may use the same three references from Section 3 in Section 5.

This Form Must Be Completed and Returned with your Submittal.

I hereby confirm that I am authorized to submit this addendum on behalf of:

Raftelis Financial Consultants, Inc.

Company Name

Henry Thomas

Representative



6/3/2025

Date

**ATTACHMENT
"B"**
The City of Deltona

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

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

1. This sworn statement is submitted with Bid, Proposal, or Contract No. 25017 for
Raftelis Financial Consultants, Inc.
[print name of the public entity]

2. This sworn statement is submitted by Jon Davis, Senior Principal
[print individual's name and title]
for Raftelis Financial Consultants, Inc.
[print name of entity submitting sworn statement]

whose business address is 227 W. Trade Street, Suite 1400, Charlotte, NC 28202

and (if applicable) its Federal Employer Identification Number (FEIN) is 20-1054069

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn
statement: _____.)

3. I understand that a "public entity crime" as defined in Paragraph 287.133 (1)(g), Florida Statutes means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any Proposal or Contract for goods or services to be provided to any public entity or an agency or political subdivision involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
4. I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment of information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
5. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
 - a. Predecessor or successor of a person convicted of a public entity crime; or
 - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime.
 - c. Those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The Ownership by one person of shares constituting a controlling

interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. [Check the one statement that applies.]

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

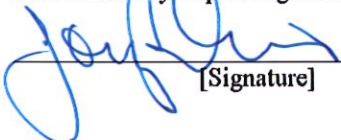
☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent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

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the Bidder or Vendor (Bidder) or any affiliate of the Bidder or Vendor (Bidder) has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies):

☐ There has been a proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings. The Final Order entered by the Hearing Officer did not place the person or affiliate on the convicted vendor list. [Attach a copy of the final order]

☐ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order).

☐ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services).


[Signature]

7/1/2025
[Date]

STATE OF North Carolina

COUNTY OF Mecklenburg


PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after

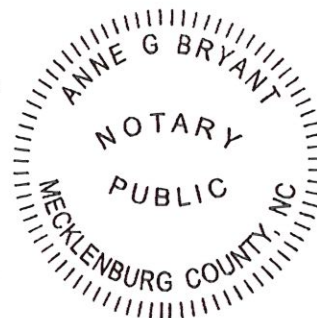
first Jon Davis being sworn by me, affixed his/her
signature in the space [Name]

provided above on this day of 1st July, 2025.

Notary Public

My commission expires May 2, 2026





DRUG FREE WORKPLACE FORM

The undersigned Respondent, in accordance with Florida Statute 287.087 hereby certifies that does: (Name of Business)

RAFTELIS FINANCIAL CONSULTANTS, INC.

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Contractual services that are under bid a copy of the Drug-Free statement.
4. Notify the employees that as a condition of working on the commodities or Contractual services that are under bid, employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or no lo contendere to, any violation of Chapter 1893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

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

Henry Thang

 (Authorized signature)

7/3/2025

 (Date)

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NON-COLLUSION AFFIDAVIT OF PRIME RESPONDENT

STATE OF (North Carolina) COUNTY OF (Mecklenburg)

_____, being duly sworn, deposes and says that:

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

(Signed) _____
(Title) _____

North Carolina

STATE OF ~~FLORIDA~~ COUNTY OF Mecklenburg

The foregoing instrument was acknowledged before me this 1st July, 2025 by

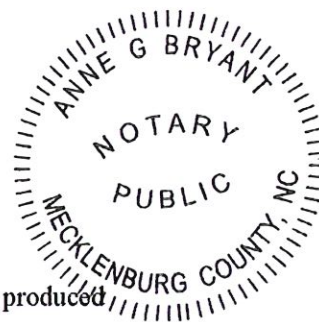
Jon Davis, who is personally known to me or who has produced

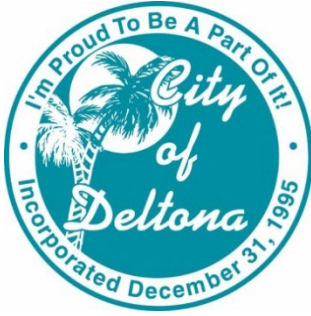
(personally known) as identification and who did (did not) take an oath.

Anne G. Bryant
(Name of Notary Typed, Printed or Stamped)

(Signature of Notary Public)

Notary Public 202112500034
(Commission Number)





ADDENDA #1 TO BID#25017

**Comprehensive Impact Fee Study for Transportation, Parks, Law Enforcement and
Fire/Rescue**

June 4, 2025

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1. This addendum is to replace page #5 with the attached new page #5

I hereby confirm that I am authorized to submit this bid on behalf of

Company Name

Representative

Date

This Form Must Be Completed and Returned with your Submittal.



ADDENDUM #2 TO RFP #25017
COMPREHENSIVE IMPACT FEE STUDY FOR TRANSPORTATION, PARKS, LAW
ENFORCEMENT AND FIRE/RESCUE
June 9, 2025

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Company Name

Representative

Date



ADDENDUM #3 TO RFP #25017
COMPREHENSIVE IMPACT FEE STUDY FOR TRANSPORTATION, PARKS, LAW
ENFORCEMENT AND FIRE/RESCUE
June 18, 2025

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Representative

Date