

Story County
Board of Supervisors Meeting
Agenda
1/28/20

1. CALL TO ORDER: 10:00 A.M.

2. PLEDGE OF ALLEGIANCE:

3. ADOPTION OF AGENDA:

4. PUBLIC COMMENT #1:

This comment period is for the public to address topics on today's agenda

5. AGENCY REPORTS:

6. CONSIDERATION OF MINUTES:

I. 1/21/20 Minutes

Department Submitting Auditor

7. CONSIDERATION OF PERSONNEL ACTIONS:

I. Action Forms

1)pay adjustment, effective 2/16/20, in a)Auditor's Office for Rhonda Sykes @ \$22.40/bw; b)Facilities Management for Laura Smith @ \$19.33/hr; c)Information Technology for Joel Ahrens @ \$31.86/hr; d)Recorder's Office for Sandra Fitzgerald @ \$19.81/hr; e)Secondary Roads/Engineer for Steven Brooks @ \$27.57/hr; Jeff Zimmerman @ \$28.49/hr; f)Sheriff's Office for Tracy Geffre @ \$2,354.40/bw; Joshua Webster @ \$2,838.80/bw; g)Treasurer's Office for Katelyn Carey @ \$17.38/hr

Department Submitting HR

8. CONSENT AGENDA:

(All items listed under the consent agenda will be enacted by one motion. There will be no separate discussion of these items unless a request is made prior to the time the Board votes on the motion.)

I. Consideration Of Resolution #20-60, To Abate Taxes Assessed Against Said Mobile Homes With A Junking Certificate

Department Submitting Treasurers Office

Documents:

[RESOLUTION TO ABATE WITH JUNKING CERT II.PDF](#)

II. Consideration Of Maintenance And Support Agreement Between Story County And RCN Communications C/O U.S. Bank Effective 1/1/20-12/31/25 For \$359.99

Department Submitting Auditor

Documents:

[US BANK.PDF](#)

III. Consideration Of 2020 Planning And Development Department Work Program

Department Submitting Planning and Development

Documents:

[STAFF MEMO.PDF](#)
[2020 P D WORK PROGRAM.PDF](#)

IV. Consideration Of 28E Agreement Between Story County And City Of Huxley For Parking Ticket Enforcement

Department Submitting Treasurers Office

Documents:

[E28.PDF](#)

9. PUBLIC HEARING ITEMS:

10. ADDITIONAL ITEMS:

I. Discussion And Consideration Of County Attorney Applicants And February 4, 2020 Presentation Requirements - Alissa Wignall

Department Submitting Board of Supervisors

II. Discussion And Selection Of Consultant To Complete The Story County Housing Study And Needs Assessment And Direct County Staff To Negotiate A Contract With The Selected Consultant
Additional Items

Department Submitting Board of Supervisors

Documents:

[WES.PDF](#)
[HANNA KEELAN.PDF](#)
[RDG.PDF](#)

11. DEPARTMENTAL REPORTS:

12. OTHER REPORTS:

I. Discussion And Direction On Draft Capital Improvements Plan (CIP) And Public Review Process - Leanne Harter

Department Submitting Board of Supervisors

Documents:

[DRAFT CIP JAN 2020.PDF](#)

TIMEFRAME FOR FY21 CIP PROCESS.PDF

13. UPCOMING AGENDA ITEMS:

14. PUBLIC FORUM #2:

Comments from the Public on Items not on this Agenda. The Board may not take any Action on the Comments due to the Requirements of the Open Meetings Law, but May Do So In the Future.

15. LIAISON ASSIGNMENTS, COMMITTEE MEETINGS UPDATES, AND ANNOUNCEMENTS FROM THE SUPERVISORS:

16. ADJOURNMENT:

Story County strives to ensure that its programs and activities do not discriminate on the basis of race, color, national origin, sex, age or disability. Persons requiring assistance, auxiliary aids or services, or accommodation because of a disability may contact the county's ADA coordinator at (515) 382-7204.



Story County Planning and Development
Administration Building
900 6th Street, Nevada, Iowa 50201

Ph. 515-382-7245 Fax 515-382-7294
www.storycountyiowa.gov

MEMORANDUM

TO: Story County Board of Supervisors
FROM: Jerry L. Moore, Planning and Development Director
RE: Action on the 2020 Planning and Development Department Work Program
MEETING
DATE: January 28, 2020

Background:

Planning and Development staff presented existing and proposed new items for the 2020 Work Program at the December 4, 2019 joint meeting with the Story County Planning and Zoning Commission and Board of Supervisors. After discussion, there was consensus to have the Planning and Development staff proceed with the items identified on the 2020 Work Program.

The Planning and Zoning Commission recommended support at their January 8, 2020 Planning and Zoning Commission meeting for the Planning and Development staff to pursue action on the 2020 Work Program items.

Recommendation:

The Planning and Zoning Commission recommends the Board of Supervisors approve the 2020 Work Program.



PLEASE RECYCLE



2020 Story County Planning and Development Work Program

This 2020 Story County Planning and Development Work Program is a guide for Planning and Development staff in the 2020 calendar year, as well as a guide for budget proposals for the 2020/2021 fiscal years. This work program is not intended to replace any essential functions of staff outlined in their job descriptions, but to build on those essential functions by identifying issues discussed by the Story County Planning and Zoning Commission and the Story County Board of Supervisors at their annual joint meeting, and determining appropriate measures to achieve the objectives of each identified work program item.

**Source: C2C Plan = C2C
Other = O**

Tier 1 High Priorities (Completion by February 2020)

1. O-Construction/Demolition Landfill
2. C2C-Audit regulations to determine whether we have Smart Development Practices that limit disaster impacts
3. O-Identify and determine if subdivision roads including private drives in unincorporated Story County have been dedicated to the public. Report on the history, purpose, and current signage of these roads.
4. O-Ames Urban Fringe Plan – prepare resolution to extend deadline, prepare schedule for future discussion and action.
(Completion by April 2020)
5. O/C2C-Conduct a comprehensive review of Land Development Regulations, including rezonings, as necessary to implement C2C and future land use map and review regulations adopted prior to 1985 for obsolete, ineffective or unenforceable regulations.
6. C2C-Review parking standards.
7. C2C-Review lighting standards.
8. O-Exploration of cities in Story County, adjacent, and other counties with building codes - pros and cons and cost benefit analysis.
9. O-Consider requesting Board of Supervisors to set policy waiving zoning permit and development application fees to Cities, States, School Districts and State agencies – Conduct County-wide department assessment.
10. O-Consideration of conservation/sustainability design standards for all County development.
11. O-Citizenserve permitting and development case software implementation.
12. O-**Watershed Assessment High & Medium Priorities** – Sensitive Environmental Areas Enhancement and Protection Program, Erosion Control & Stormwater Management & Municipal Outreach (See Watershed Assessment Implementation Matrix for details).



2020 Story County Planning and Development Work Program

Tier 2 Medium Priorities (Completion by June 2020)

13. C2C-Establish location guidelines for proposed subdivisions.
14. C2C-Establish minimum levels of services.
15. C2C-Review and consider ways to connect streets and trails for a unified transportation network appropriate to Story County.
16. C2C-Create a development review evaluation matrix to determine potential ag/non-ag conflicts
17. C2C-Designate Natural Resource Areas on future land use map (In Growth Townships)
18. C2C-Develop and implement requirements for groundwater impact analysis
19. O-Explore options/regulations for reusing existing accessory structures and construction of new accessory structures
20. O-Explore opportunities in other areas of the County (Iowa Center and Shipley) to assess and respond to needs, similar to the work completed in Fernald (Work Program 2018)
21. O-**Strategic Plan High Priorities** – Access broadband connectivity, Central Mission Statement, Explore partnerships such as 28E's to provide existing services efficiently, Conduct study assess needs for enhanced security, Develop metrics to determine which roads get improved, Seek out public-private partnerships to improve transportation networks, Access and create plan to address internal technology needs and upgrades, Develop, implement and monitor strategies and partnerships to build upon county-wide watershed assessments (See Strategic Plan 2019-2023 for details).

Tier 3 Low Priorities (Completion by end of December 2020)

22. C2C-Draft healthy homes design guidelines
23. C2C-Develop public outreach toolkit to be used with the development review process
24. C2C-Designate Natural Resource Areas on future land use map (In Remaining Townships)
25. C2C-Develop density based zoning program

Type of Document: 28E Agreement

Preparer: Ted Rasmusson – Story County Treasurer, 900 6th Street, Nevada, IA 50201, 515-382-7330

Taxpayer Information: N/A

Return Document to: Michelle Bellile, Story County Auditor's Office, 900 6th Street, Nevada, IA 50201

Grantors:

City of Huxley, Huxley
Story County, Iowa

Grantees:

City of Huxley, Iowa
Story County, Iowa

Legal Description: N/A

Instrument Number/Book and Page Reference: N/A

28E Agreement between
The City of Huxley, Iowa
and
Story County, Iowa

This Agreement is made pursuant to Chapter 28E of the Iowa Code between the City of Huxley, Iowa, hereinafter referred to as "the City" and the County of Story, Iowa, hereinafter referred to as "the County".

WHEREAS Iowa Code Section 331.553(8) provides that a County Treasurer may enter into an agreement under Iowa Code 28E to collect or enforce delinquent parking fines on behalf of a City in conjunction with renewal of motor vehicle registrations pursuant to Iowa Code Sections 321.40(4) and 321.236; and

WHEREAS the City and the County wish to enter into such an agreement for the collection or enforcement of delinquent parking fines owed to the City;

NOW, THEREFORE, the City and the County do hereby agree as follows:

SECTION 1. AUTHORITY. The City, acting through its City Council, and the County, acting through its County Board of Supervisors, enter into this Agreement by virtue of the powers granted to them under Chapter 28E of the Iowa Code.

SECTION 2. PURPOSE. The purpose of this Agreement is to authorize the County Treasurer's Office to assist in the collection of delinquent parking fines by enacting a "stop" on the registered vehicle owner which will preclude them from renewing their motor vehicle(s) registration pursuant to Iowa Code Sections 321.40(4) and 321.236 until the City has confirmed the vehicle owner has satisfactorily addressed the delinquent fines.

SECTION 3. SERVICE AREA. The service area of this Agreement is within the incorporated area of the City.

SECTION 4. DUTIES. The City shall, prior to the 5th day of the month and when necessary, certify and provide to the County Treasurer a list of all persons with delinquent parking fines owed to the City. The City shall hold the County harmless and the City shall assume all liability for any failure to properly maintain ticket status information. The list shall include: Registered Owner(s), License Plate Number, and at least one citation number.

The County Treasurer's Office shall enter a "stop" on the Registered Owner(s) in the Iowa Department of Transportation (IDOT) system which precludes the owner(s) from renewing the

registration of any motor vehicles. The County Treasurer's Office will enforce the stop by refusing registration renewal to any applicant for whom the County Treasurer's Office has received certification that said applicant has one or more uncontested, delinquent parking tickets owed to the City.

The County Treasurer's Office will not collect any funds for the delinquent parking fines, but rather direct the applicant back to the City to remit the issue.

The City will contact the County Treasurer's Office through email immediately (with the exception of transactions that occur after 4:15 p.m., which may be communicated on the next business day) once a Registered Owner(s) with delinquent parking tickets has satisfied the delinquent fines and ask for the removal of the "stop" from the IDOT system. The County Treasurer's Office will immediately remove the "stop" and the Registered Owner(s) will be allowed to renew vehicle registrations again. The County Treasurer shall notify the City through email that the "stop" has been removed.

SECTION 5. COMPENSATION. The Treasurer's Office shall be permitted to receive \$5.00 from the City for administrative cost for each Registered Owner "stop" placed by the Treasurer's Office pursuant to Iowa Code Section 331.553(8). The Treasurer's Office shall send an invoice to the City by the 15th of each month; the City will provide payment within 30 days of the invoice.

SECTION 6. EFFECTIVE DATE. This agreement shall be effective upon its approval and execution by the City and the County and its recording with the County Recorder and the Secretary of State for the State of Iowa pursuant to the requirements of Code of Iowa, Chapter 28E.

SECTION 7. DURATION. This agreement shall be effective upon signature of both parties and continue until terminated.

SECTION 8. TERMINATION. Any party to this Agreement may terminate this Agreement by giving written notice to the other party at least ninety (90) days in advance of the date of termination. Should Iowa Code Sections 321.40(4) and 321.236 be struck or materially amended so as to prohibit the "stop" on registered vehicles for unpaid parking tickets, this agreement shall immediately terminate.

SECTION 9. NOTICE. Notice of certification of delinquent parking fines and certification of remittance of the delinquent parking fines sent from the City to the County will be emailed to Treasurer@StoryCountyIowa.gov.

Notices of invoice for the placement of "stops" shall be sent by the County to the City will be emailed to gstoll@huxleyiowa.org. The City may notify the County in writing to change the designated notification person.

SECTION 10. SAVINGS CLAUSE. If any section, provision, or part of this agreement shall be found to be unconstitutional, such finding shall not affect the validity of the agreement as a whole or any section, provision or part thereof not found to be invalid or unconstitutional.

SECTION 11. ENTIRE AGREEMENT. This agreement represents the entire agreement between the parties as to the subject of this agreement. Any subsequent modification to the terms of this agreement shall be in the form of a duly executed Addendum to this agreement.

SECTION 12. AMENDMENTS. This agreement may be amended at any time by mutual agreement of the parties. Any party desiring an amendment to this agreement shall notify the other party of its desire, and the reason for the request. Such a request shall be in writing to the other party, and shall be considered by the other party without unreasonable delay and within no more than (90) days of receipt.

SECTION 13. GOVERNING LAW. This agreement shall be governed by and interpreted under the laws of the State of Iowa.

SECTION 14. SIGNATURE PAGES. The parties agree that this agreement has attached to it signature pages which shall be assembled and filed together with the agreement and shall together constitute one and the same instrument. A completed copy of the agreement with executed signature pages shall be sent to each party.

CITY OF HUXLEY, IOWA

By: _____

Mayor

Attest: _____

City Clerk

STORY COUNTY IOWA

By: _____

Board of Supervisors, Chairperson

Attest: _____

Auditor



WESTERN ECONOMIC SERVICES, LLC

December 11, 2019

Story County Auditor's Office
c/o County Outreach and Special Projects Manager
Story County Administration
900 6th Street
Nevada, IA 50201

Re: Response to Request for Proposals

To Whom This May Concern:

Western Economic Services, LLC, (WES) is pleased to submit to you and the Story County Outreach and Special Projects Manager a proposal response to develop a Housing Study and Needs Assessment. As per the RFP guidelines, one printed and one electronic copy are being submitted.

Meeting the long-term housing needs of the County demands creativity and the abilities of people with diverse skills working together toward a common goal. Researching and evaluating housing needs, conducting statistical and inferential analysis, fielding surveys, conducting consultations, facilitating a team spirit, evaluating the housing stock, developing consensus, and delivering a well-written report are all called for in this project.

WES has these unique capabilities. For over 34 years, WES has conducted housing market studies. We have both the depth of experience and the breadth of knowledge of how to evaluate housing issues that are indispensable for this type of specialty. We have an established track record for preparing and delivering this type of work specially designed for planning functions at both the state and local level.

During the last five years, we have prepared housing assessments, affordable housing needs evaluations, housing affordability, and housing market studies for state and local government in many geographic areas, such as Alabama, Colorado, Georgia, Iowa, Louisiana, Minnesota, Mississippi, Montana, Nebraska, Nevada, New Mexico, North Carolina, North Dakota, Oklahoma, Oregon, Rhode Island, South Dakota, Texas, and Wyoming as well as the Commonwealth of the Northern Mariana Islands. In fact, we have again been hired by the Iowa Finance Authority to conduct a Statewide, County, and City housing needs assessment, as well as preparing these for the Cities of West Des Moines and Davenport. We are particularly skilled at preparing housing evaluations for rural areas, whether growing or in decline. Overall, WES brings a unique set of skills and knowledgeable experiences to this project, knowledge that will greatly benefit and be cost effective for the County and its communities.

We look forward to talking with representatives of the County about our approach to this project and how we can best address the needs of each of the County's communities. Please feel free to contact me if you have any questions or concerns; your inquiries can be directed via e-mail to me at rgaudin@westernes.com or by telephone or fax at the contact numbers listed at the bottom of this page.

Sincerely yours,

Robert M. Gaudin
Operating Partner

RMG:kmb
SCIA01p1.doc
attachment

212 SE 18th Ave • Portland, OR 97214 • 503.239.9091 (P) • 503.239.0236 (F) • westernes.com

RESPONSE TO RFP:

**HOUSING STUDY AND
NEEDS ASSESSMENT**

SUBMITTED TO STORY COUNTY, IOWA

December 11, 2019



W E S

**Prepared by
Western Economic Services, LLC**



**RESPONSE TO RFP:
HOUSING STUDY AND NEEDS ASSESSMENT**

**SUBMITTED TO THE
STORY COUNTY AUDITOR'S OFFICE
COUNTY OUTREACH AND SPECIAL PROJECTS MANAGER**



Prepared by
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Fax: 503.239.0236

www.westernes.com
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December 11, 2019





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This proposal was submitted by Western Economic Services, LLC. With this proposal, we commit ourselves to executing the scope of work defined herein, including coordinating our efforts with the County Outreach and Special Projects Manager, and other agencies and organizations as needed. This proposal is organized as per the instructions listed in the County’s RFP.

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I. WES Experience and Professional Qualifications

A. Introduction to Western Economic Services, LLC

Western Economic Services, LLC (WES) has provided economic and demographic analysis, market research, forecasting, and strategic planning services to clients throughout the United States for the past 34 years. This is a testament to our fiscal stability and service reliability. Furthermore, WES specializes in housing evaluations, with expertise in the following areas:

- Preparing Housing Studies and Needs Assessments,
- Preparing Analyses of Impediments to Fair Housing,
- Conducting housing and community development evaluations,
- Illuminating economic and community development opportunities, and
- Guiding and facilitating housing policy and strategic planning processes.

In fact, WES has performed long-range planning analysis and studies – similar in design, scope and content – for a variety of units of government in the 31 states of Alabama, Arkansas, Arizona, California, Colorado, Florida, Georgia, Illinois, Louisiana, Massachusetts, Minnesota, Mississippi, Montana, Nebraska, Nevada, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Virginia, Washington and Wyoming, as well as the Commonwealth of the Northern Marina Islands.

WES is a relatively small firm, with seven professional staff, one research assistant, and three and survey employees. Our headquarters are located at 212 SE 18th Avenue, in Portland, Oregon, although we also have branch offices in Waynesboro, Pennsylvania and Jackson, Mississippi. This contract will be serviced from our Portland, Oregon, office.

B. WES General Scope of Services

WES has acquired broad, varied, and comprehensive knowledge of housing issues over the years. WES has evaluated and identified housing needs by tenure and by income; conducted original survey research and described the condition and detailed characteristics of the housing stock; and depicted the size, racial composition, income status, and ages of resident households. WES has also quantified future demands for housing by tenure and income of householders, portrayed needs of special populations, conducted market segmentation and analysis, assessed housing equity and facilitated the development of policy goals.

WES has extensive knowledge relating to research in support of housing development activities and in the establishment of performance measures to track progress toward strategic goals. WES understands how to blend high-grade quantitative analysis with the qualitative features, or the perceptions of need. Geographic areas of research have encompassed blocks, block groups, Census tracts, school districts, towns, cities, urban counties, metro and non-metropolitan regions, and entire states. The following narrative presents selected topics as evidence of this expertise.

Housing Needs Assessment and Housing Forecasts. WES has prepared forecasts of housing needs, incorporating data on household formation for both renters and homeowners by income. WES has also prepared assessments for special needs and other populations, and by demand for dwelling units by size. To predict household formation, population forecasts have been either developed or adopted from other entities. If such a forecast needs to be created, WES has done additional economic and demographic modeling, such as employment and income forecasts. Predicted income categories represent a percentage share of median family income. Data have been drawn from one or more decennial Censuses for the years 1960, 1970, 1980, 1990, 2000, and 2010.

Housing and Community Development Surveys. WES has designed mail, telephone, online, and on-site surveys to assess housing and community development needs. In one instance, 4,000 surveys were sent to randomly selected citizens. The surveys related to the respondents' housing; housing conditions; fair housing compliance; and housing affordability, availability, accessibility, and suitability. Respondents' opinions regarding attributes of their community were solicited as well. WES's mail surveys have attained response rates as high as 63.7 percent. WES routinely conducts telephone surveys that collect rental information, with some surveys targeting more than 120,000 units. WES processes all data, performs the analysis, and presents results depicting attributes and perceptions of the surveyed population in terms of housing and community development needs.

Housing Market Analysis. WES has conducted housing market analyses for housing and community development plans and other development and planning needs. Some information was obtained from the decennial Censuses, as well as the American Community Survey, such as the type of dwelling unit, tenure, urban versus rural, occupied versus unoccupied, year built, number of rooms, and housing size. Each piece of information was analyzed by a geographic subunit (e.g., city, town, county). WES has also collected building permits, multiple listing service data, property demolition and conversion statistics, residential foreclosure information, and Home Mortgage Disclosure Act lending activity, which have all contributed to evaluating the housing market. Analyses have been expanded further by various survey methods, including mail, telephone, and on-line surveys of housing experts, which generate assessments of the predominant unit type, size, cost, age, and similar data, including barriers to the production of housing.

Housing Inventory Conditions and Assessments. WES has researched housing inventory conditions for state and local jurisdictions and determined the prevalence of overcrowding by income, race, ethnicity, and geographic area. Through either census or survey techniques, WES has generated weighted estimates of the degree to which homes have poor roof conditions, poor foundation conditions, sticking doors and windows, missing window panes, poor ceiling or wall conditions, soot or smoke escaping into the dwelling unit, and high infiltration rates (air leakages in the home). WES also frequently uses extracts of county assessor appraisal databases to explore these issues in greater detail—data that categorize the effective age of the dwellings, the physical condition, and the grade of materials and workmanship used in the original construction of the dwelling. These data allow a better determination of the need for residential rehabilitation versus redevelopment as well as current price trends and, often, conditions experienced during sale of the property.

Fair Housing Impediments Analysis. WES has prepared many of these analyses over the years. These studies incorporate both quantitative and qualitative data sources, including the Census Bureau Decennial Census, American Community Survey (ACS), and capture the qualitative nature of citizen engagement activities, and quantify actions that the jurisdiction can take to overcome the identified impediments, with specific measurement criteria. This incorporates surveys of residents, surveys of stakeholders, and the data for public housing authorities. This targets equity considerations, concentrations of poverty and racial and ethnic minorities, complications for protected classes, particularly for persons with disabilities, and unravels particular outcomes for representatives of state and local government.

Age, Gender, Race and Ethnicity, Households, Tenure, Poverty, and Special Needs Populations. This information has been drawn from a wide variety of sources and research methods. In general, data are drawn from the decennial Censuses or ACS, including the special tabulations prepared by the Census Bureau. These data also estimate the number and type of families in need of housing assistance in the extremely-low-income, low-income, moderate-income, and middle-income brackets; renters and owners; elderly persons; single persons; and large families. WES is very

familiar with HUD's Comprehensive Housing Affordability Strategy (CHAS) data, understands its limitations, and knows when one-year, three-year, and five-year American Community Survey (ACS) averages need to be used.

Socio-Economic Profiles. WES inspects the economic complexity of the state, local, and regional economies; assesses the comparative advantage of key industries; evaluates the industrial linkages within the regional economy; and determines the need for particular types of economic growth. This type of analysis includes assessing income and the needs for growth in earnings as well as economic impact, which determine both the direct and indirect effects of particular economic development options and related infrastructure requirements. These issues relate to the ability of households to afford housing—and at what cost. This type of service also incorporates evaluating the overall vitality of a geographic area, including determining the community's economic status today and the direction in which the community may be headed. This aids in the development of strategies for improving the economic climate.

Citizen Involvement and Public Presentations. WES offers the option of public and citizen involvement processes for all of our work products. Typically, these processes include the facilitation of focus groups, presentations of preliminary findings to public officials, group facilitation settings, public input sessions, stakeholder interviews, participant surveys, and even formal speeches at conferences or interviews with mass media. WES encourages such involvement as a key portion of public policy design and responsible public leadership.

C. WES Mission Statement

WES quality control mechanisms are driven in large part by our commitment, ethics, and operating philosophy. At WES, we conduct customized research to meet each client's specific needs, and we work closely with those clients to ensure that our research findings and their implications are fully understood. We are dedicated to ensuring that our clients are proud of their choices, our products, and the outcomes of their planning activities. WES offers a unique set of skills and experiences geared toward high-quality work.

Our body of work represents a synergy; the whole is much greater than the sum of its parts. The following list represents the most salient parts of our valued business philosophy and explains why our clients continue to use our services:

- WES utilizes a comprehensive approach to all engagements. This orientation emphasizes long-term, beneficial relationships that result in effective client accomplishments.
- Having a long-term vision allows WES to create strategic solutions to operations, marketing, and planning activities.
- WES consistently demonstrates a firm grasp on the depth and breadth of key planning processes and the difficulties likely to be encountered. Our 34 years of experience encompass activities in both the public and private sectors, and our work has continuously delivered valid and reliable results.
- Because of our small size, we have the flexibility to adapt quickly to new situations while still maintaining full attention and dedication to client needs. Our proven track record for adapting to 11th-hour modifications, while remaining on-budget and on-schedule, is a major factor behind the high level of repeat business that we enjoy from our loyal client base.
- A key to our ability to adapt is our individualized approach to every project. Each client engagement has a customized design, emphasizing the unique characteristics of the project. With such tailored methodologies, WES can offer highly valued products and services for cost-effective fees in concert with schedules that meet the planning needs of our clients' overall operations.

II. WES Relevant Experience

A. Recent Projects Conducted by WES

Due to the type of work required for the Story County Housing Study and Needs Assessment, the analytical skills needed are broad and require rigorous attention to detail and quality control. Hence, WES's pertinent experience is best described by our primary business activity: housing planning services. The following project descriptions offer a sample of our housing study experience.

City West Des Moines, Iowa

In 2018, Western Economics Services (WES) successfully completed a comprehensive housing needs assessment for the City of West Des Moines. WES provided the city with a comprehensive analysis of key demographic, economic and housing data from a variety of sources. Demographic trends were evaluated based on the most recent U.S. Census estimates including aging, racial composition of the population, education trends and examining the rate of persons with disability. Economic statistics were gathered from the Bureau of Labor Statistics (BLS) as well as the Bureau of Economic Analysis (BEA) and examined employment and earnings levels for the City of West Des Moines. The housing analysis included data from the most recent U.S. Census 5-year ACS dataset along with custom tabulation of West Des Moines assessor data. WES estimated a forecast of future housing need for the City of West Des Moines by tenure and income levels. The public input process was robust, including three separate surveys, presentations before the City Council and several stake holder meetings. WES incorporated the public input process along with the data analysis to identify the most pressing housing challenges and recommendations to alleviate these housing needs.

City of Thornton, Colorado

Western Economic Services (WES) performed a dual Housing Needs Assessment and Analysis to Impediments of Fair housing on behalf of the City of Thornton in 2019. This project included the collection, processing and mapping of a variety of data concepts, from sources such as the U.S. Census, the Bureau of Labor Statistics and the Department of Housing and Urban Development. It also included the collection of public input from the citizens of Thornton with 3 separate surveys and a public input meeting. In response to community feedback WES performed additional analysis on specific topics recommended by the citizens of Thornton. As a result the report was a successful in highlighting the most pressing housing needs in the city as well as identifying any potential barriers to fair housing choice. WES always strives to meet the exacting demands of community development department professionals and the citizens they represent.

The City of Grand Junction, Colorado

In latter 2015, WES was selected to evaluate the housing sector in the greater Grand Valley of Colorado, comprising eight communities, including the three incorporate cities of Grand Junction, Fruita, and Palisade and four more unincorporated communities and the remainder of the unincorporated Grand Valley. A housing needs survey was conducted, along with three focus groups and several public input meetings. WES was able to identify the number of households that were experiencing housing problems today, by tenure and income for each of the communities. WES also prepared a housing demand forecast through 2040, by community, tenure, and income. WES contrasted this demand forecast with the available land that would be demanded over this time period. WES identified the communities that had insufficient land



for the forecasted need. WES identified a selection of policies and strategies that the Grand Valley might wish to consider in addressing the unfolding housing needs.

Los Angeles County, California, Community Development Commission

In 2007, 2012, and again in 2017, the Community Development Commission (CDC) of the County of Los Angeles selected WES to prepare the County's Five-Year Consolidated Plan for Housing and Community Development. While the entire Consolidated Plan covered many things, the housing market analysis addressed a 25-year housing forecast, by tenure and income. It also evaluated current building trends, addressed the current mortgage market and the degree of subprime lending activity, and interpreted the qualitative needs expressed in the both the 2007 and 2012 resident community surveys. Several focus groups were also conducted, one of which related specifically to the need for housing. During the second quarter of 2012, WES again began preparing the newest Five-Year Housing and Community Development Consolidated Plan for the County of Los Angeles CDC. These efforts have included surveys, focus groups, housing demand forecasts, 2010 Census and ACS data, as well as inventories and assessments of the current housing stock. This evaluation mirrored that which was performed in 2007, but included populating the Consolidated Plan and Annual Action Plan in the IDIS eCon Planning Suite.

The Nebraska Investment Finance Authority

Each year since 2002, WES has prepared a comprehensive, statewide housing needs evaluation for the State of Nebraska. This information reviews detailed housing statistics, by state, region, 93 counties, and 31 cities in the state. Further, WES assesses the economic and demographic influences that affect the provision and consumption of affordable housing. WES also manages a Nebraska Dashboard, which may be view by looking at www.westernes.com/Nebraska.

Data include geographic (GIS) maps, tables, charts and an exhaustive narrative. This information establishes a badly needed baseline and evaluates trends in the socio-economic complexion of Nebraska as it influences the provision of housing and housing-related services. Demographic data include a wide array of decennial census data from 1990, 2000 and 2010 as well as intercensal estimates. This includes population by race, ethnicity, and age cohorts. Additional data addressing disabled persons residing in non-institutionalized group quarters, housing value and percent of income expended on housing were drawn from the Five-Year American Community Survey. All of these data sets are expressed by county, region and state.

Economic influences, extracted from data spanning over 30 years, are evaluated. Personal income statistics, poverty data, median incomes and even personal bankruptcy statistics are inspected. The report also includes more than 10 years of labor force statistics, such as the number of people working and unemployment rates. These data aid depiction of the economic influences at work in the marketplace for housing and housing related services. Housing statistics include the decennial census data for the entire housing stock, by tenure, as well as a breakdown of the housing stock by type of dwelling unit, age of the unit, physical characteristics of the stock and the disposition of vacant housing. Of particular import was the sharp increase in "other vacant" housing, or housing not available to the market place. Additional information assessed building permit activity and value of permitted construction. This is reported for single-family dwellings, duplex, tri- and four-plex units, and buildings with five or more units. Again, these data are presented by county, region and state.

The Nebraska Department of Revenue, Property Assessment Division keeps records of all property transactions in the state. Property transaction data are captured and analyzed by county and region. Sales prices, physical condition, age, size, and other general characteristics

of residential dwellings sold, by year and by county, are also described. Another research task involved a telephone survey, which determines current rental vacancy and absorption rates as well as rental prices for both market and assisted (or subsidized) units throughout the state. In the 2017 Nebraska Profile, nearly 120,000 rental units were surveyed.

The Wyoming Community Development Authority

Wyoming Housing Database Partnership. Following a national competitive solicitation process, WES was awarded administration of the Wyoming Housing Database Partnership (WHDP) in January of 2001 and has worked on behalf of the WHDP since that time. The State of Wyoming has nearly 590,000 people. The Partnership, formed in 1997, is a cooperative arrangement between the Wyoming Community Development Authority, the Division of Economic Analysis, the Wyoming Business Council, the Wyoming DOT, the Wyoming Association of Municipalities, and other for-profit and non-profit entities throughout the state. The following products are simple examples of work conducted on behalf of the WHDP.

The Semi-Annual Profile of Wyoming Demographics, Economics and Housing is a two-volume document comprising a comprehensive analysis of county and state housing, economic and demographic data, as well as population migration patterns, economic influences and housing market conditions, including home sale and rental prices, which affect the provision of affordable housing throughout Wyoming. Data incorporate building permit information, tenure and homeownership rates, and a wide variety of additional data. Three types of surveys are conducted for each *semi-annual* report. One is a telephone survey of the rental market that captures vacancy rates, absorption rates, prices, and characteristics data of the rental market, such as the units designed for particular subgroups of the population (e.g., the disabled). Another survey pertains to the availability of mobile home lots. The third is another telephone survey of a sample of new residents of the state. It is used to better understand where demand will manifest itself, the preferred tenure and buy versus build choices for new residents of the state. WES manages the Wyoming Dashboard for the agency, which may be viewed at www.westernes.com/Wyoming.

The 2017 Wyoming Housing Needs Forecast documented a prediction of Wyoming's annual housing needs over the next twenty-five years. The housing forecast was separated by tenure and income of the household for each of Wyoming's counties and forty-six selected communities throughout the state. This document showed how the demand for different types of housing will indeed vary over the forecast horizon.

The 2011 Wyoming Housing Conditions Study presents research that was facilitated by the use of a series of data files prepared and submitted by each of the state's county assessors. Data contained in the files represented each residential property's appraisal record. Using this information, WES was able to quantify the characteristics of the existing housing stock as well as determine the number of housing units in the state that were in need of repair.

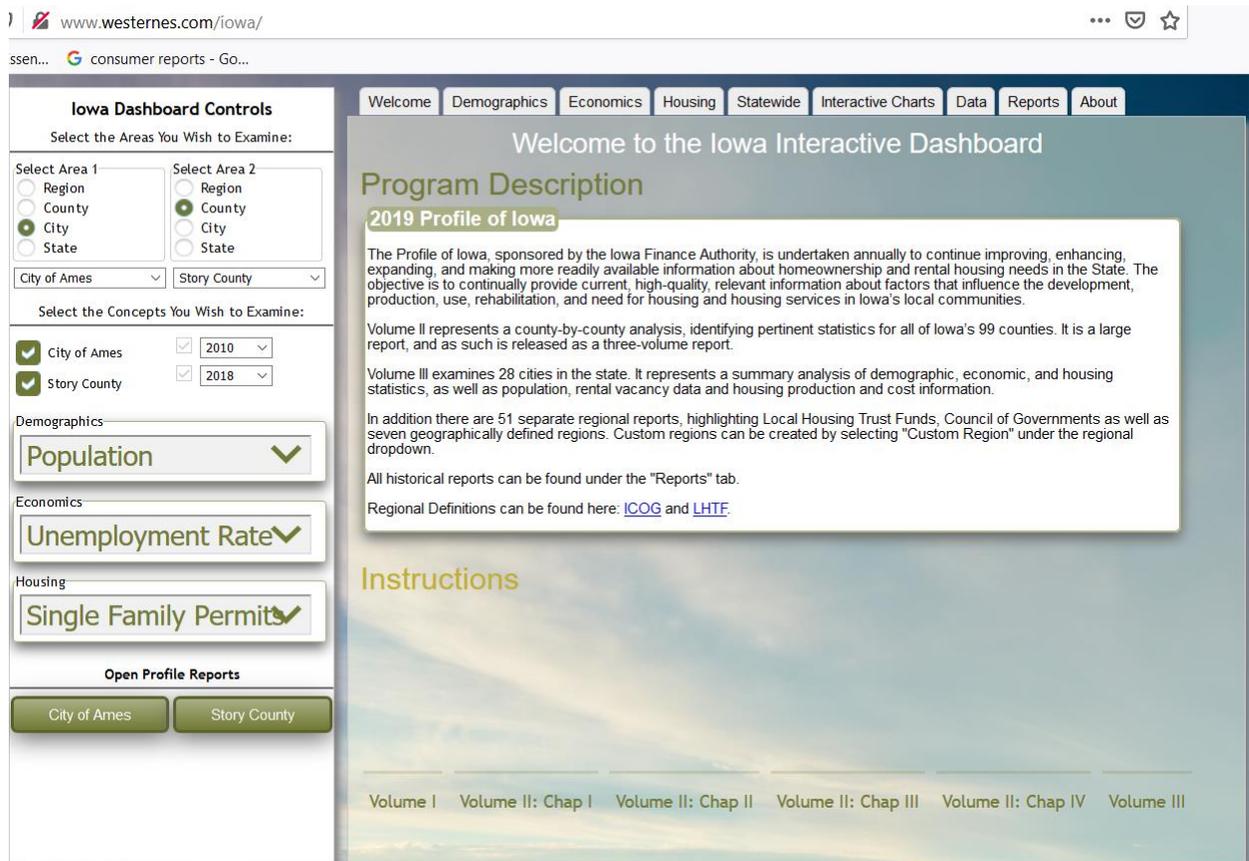
The Iowa Finance Authority

The Iowa Finance Authority (IFA) first selected WES to prepare an Iowa Profile of Demographics, Economics, and Housing in May of 2017; and, we have continued to prepare this annually each year since. The IFA wishes to provide current, high-quality, relevant information about the factors that influence the development, production, use, rehabilitation, demand, and need for housing and housing services in Iowa's local communities. Plus, having this information will enable the IFA to better design its programs to target unmet housing needs, identify gaps in the affordable housing delivery system, and better discern the sometimes subtle differences between housing needs in various areas of the State. The goals of the study are to



enrich policy formation and decision-making capacity, interpret and predict affordable housing needs at state and local levels, and better inform others when making housing choices. The results of these research efforts assist planners, developers, lenders, state and local government agencies, non-profit and for-profit organizations, and the IFA, as well as other providers of affordable housing and housing-related services throughout Iowa.

The Iowa Profile seeks to analyze key data at a variety of jurisdictional levels. It is split into three volumes, with Volume I focusing on the state and eight (8) separate regions, Volume II focusing on each of Iowa's 99 counties, and Volume III inspecting each of 28 Iowa cities with populations above 14,000 persons, as reported in the 2010 Census. Lastly, a dashboard has been constructed, similar in style and content to both the Wyoming and Nebraska Dashboards, and it may be viewed at www.westernes.com/iowa. The Dashboard, with Ames and Story County begins with an image that looks like the following:



The Mississippi Development Authority

During 2015, WES prepared the State's 2015-2019 Five-Year Consolidated Plan, part of which contained a housing needs and a housing market assessment. WES initiated the process by developing the citizen participation plan. WES then designed a comprehensive housing and community development survey, which was distributed throughout the state by the Mississippi Development Authority. WES assess the expressed needs from the survey, which were defined as "no need", "slight need", "moderate need", and "extreme need". Questions on the survey included housing service needs for special populations as well. Furthermore, WES quantified housing and homeless needs seen from Census data, a series of focus groups and public input meetings. WES quantified the level of unmet housing need by family type, tenure, and income

as well as interpreted the needs associated with the State's homeless population. Additionally, WES prepared the non-housing community development needs assessment for the Consolidated Plan. This was all used to populate the eCon Planning Suite for the Mississippi Consolidated Plan.

The North Dakota Department of Commerce

During 2014 and 2015, WES prepared the State's 2015-2019 Five-Year Consolidated Plan, part of which contained a housing and homeless needs assessment as well as a housing market analysis. WES also designed a comprehensive housing and community development survey, which was distributed throughout the state by the North Dakota Department of Commerce. Furthermore, WES quantified housing and homeless needs seen from Census data, a series of focus groups, and public input meetings. WES identified the level of unmet housing need by family type, tenure, and income. Furthermore, WES assessed the non-housing community development needs and constructed the entire Consolidated Plan through the use of the eCon Planning Suite.

The Nevada Housing Division

During 2014 and 2015, WES prepared the State's 2015-2019 Five-Year Consolidated Plan, Annual Action Plan and its Analysis of Impediments to Fair Housing Choice. Part of the Consolidated Plan contained a housing and homeless needs assessment as well as a housing market analysis. WES also designed a comprehensive housing and community development survey, which was distributed throughout the state by the Nevada Division of Housing and the Nevada Governor's Office. WES evaluated the expressed needs from the survey. Questions on the survey included housing service needs for special populations as well. Furthermore, WES quantified housing and homeless needs seen from Census data, a series of focus groups, and public input meetings. WES identified the level of unmet housing need by family type, tenure, and income. Furthermore, WES assessed the non-housing community development needs and constructed the entire Consolidated Plan through the use of the eCon Planning Suite.

The New Mexico Mortgage Finance Agency

In 2010 and again in 2014, the New Mexico Mortgage Finance Agency selected WES to prepare its Annual Action Plan, Five-Year Consolidated Plan for Housing and Community Development and its Analysis of Impediments to Fair Housing Choice. This planning document included a discussion of the current economic climate, demographic trends, and the current housing market on its way to defining the housing and homeless needs assessment. WES evaluated the current housing stock, production and affordability of that stock, lead-based paint hazards, assessed public and assisted housing, and created a housing needs forecast. WES was able to identify the current level of unmet housing needs as well as disproportionate housing needs for selected housing populations. WES prepared a comprehensive evaluation of the state's continuum of care organizations, the service territories that were addressed and the needs of the state's homeless populations.

This housing and homeless needs assessment included an on-line housing and community development survey, from which WES was able to present the degree of need by general geographic area throughout the state, as exemplified by the affordable rental needs map presented at right. Additionally, there were four focus groups on specific housing topics, such as preservation or homelessness, and a series of public input meetings. WES produced a set of housing priorities, priority rankings, and an evaluation of non-homeless special needs. This planning process also concluded with the production of five-year housing and community

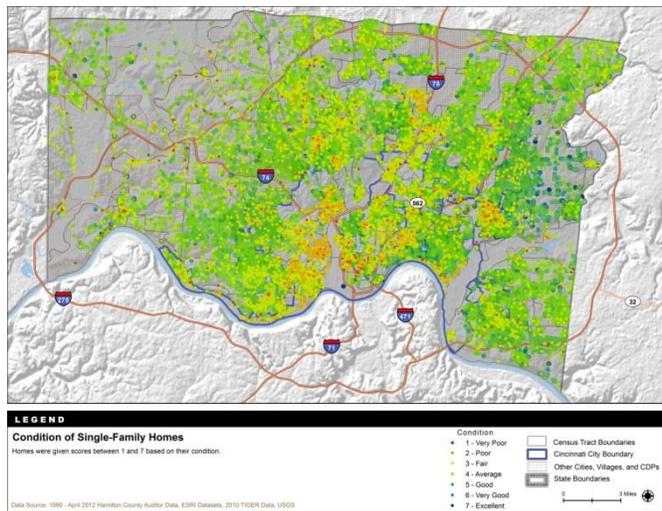
development goals, objectives, and strategies, which included a set of performance measurement activities.

Minnesota Department of Employment and Economic Development

The Minnesota Department of Employment and Economic Development, with participation of the Minnesota Housing Finance Agency and the Minnesota Department of Human Services, selected WES in 2011 and again in 2016 to prepare the State’s Consolidated Plan for Housing and Community Development. This document includes an exhaustive housing and homeless needs assessment. Data was extracted from the 2010 Census as well as the 2010 Five-Year American Community Survey. Evaluation of the current economic climate was included with the assessment and how this has influenced demographic change and housing trends. These relationships were presented in tabular, chart, and geographic map formats, depending on the concept. Housing trends were explored in great detail, highlighting the disposition of vacant housing, and noting that “other housing”, or vacant housing not available to the market place had risen some 155 percent over the past decade. WES prepared an on-line housing and community development survey to gather perspective and commentary about housing and community development needs throughout the State. These data collection activities also included focus groups, public input meetings, as well as conversations with other departments and communities throughout the State. The conclusion to this planning process was the production of five-year housing and community development goals, objectives, and strategies, which included a set of performance measurement activities.

Cincinnati Metropolitan Housing Authority

The Cincinnati Metropolitan Housing Authority selected WES to prepare a comprehensive housing study for all of Hamilton County, Ohio, including the City of Cincinnati. This particular evaluation included the entire market for housing, not just affordable or assisted housing. The assessment took consideration of the past, such as the evidence of declining population over the past 40 years, at the same time that new construction had been occurring. WES tapped into the Hamilton County Assessor’s appraisal data in the evaluation of the current marketplace and the current condition of housing. This included such concerns as the recent trends in housing prices, current physical conditions of housing and the quality of the materials and workmanship used in the original construction. WES was able to explicitly identify where clusters of poor quality worn out housing was located as well as where worn out but good quality housing was located. These two conditions identified both redevelopment and rehabilitation opportunities for the County. These were presented in a series of geographic maps, or thematic “heat maps”, such as the single family housing conditions sample presented at right.



The Centralina Council of Governments

In April of 2013, the Centralina Council of Governments of Charlotte, North Carolina, and the Catawba Council of Governments, of Rock Hill, South Carolina Selected WES to prepare a Comprehensive Regional Housing Strategy. This was in response to the concerns about current and future housing needs. The CONNECT Our Future project launched the Comprehensive Regional Housing Strategy as one component of the Regional Growth Framework.

The 2013 Comprehensive Regional Housing Strategy represents a thorough examination of a variety of sources related to housing within the 14-county region. This study involved primary research, such as that drawn from the 2013 Housing Needs Assessment Survey, an exhaustive telephone survey of rental properties, a survey of 450 key employers in the region, and options expressed during a series of public open house meetings; it also includes the evaluation of secondary research, which entailed the collection and analysis of existing data, such as County Assessor data, building permits, 2000 and 2010 Decennial Census data, the 2011 American Community Survey data, and employment and income information from other federal data sources. A local employment and population forecast was also utilized to create a housing needs forecast, for each of 49 geographic areas, by tenure, and by income group.

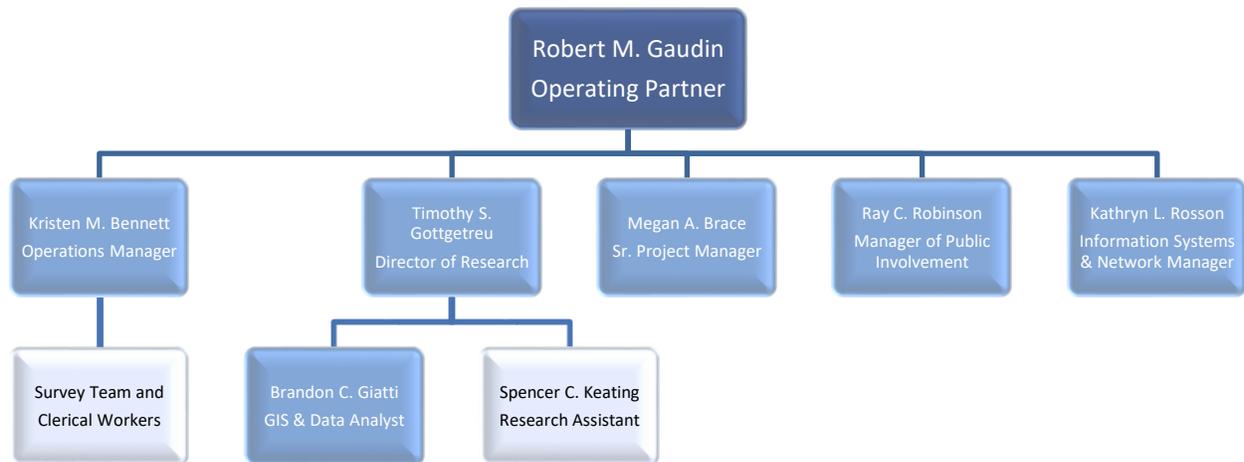
B. Samples of Recent Project

Recent projects may be viewed at www.westernes.com/worksamples

III. WES Organizational Chart and Resumes

A. Organizational Chart

While Western Economic Services, LLC (WES) is a small firm, we have seven professionals and four research, survey, and clerical staff persons that will be devoted to the Housing Study and Needs Assessment. Our entire team has the skills, experience, and reliability desired by the County. The following presents our organizational structure.



B. Experience and Resumes of WES Staff Dedicated to Story County

WES will not be using any third parties or subcontractors for this project. This project will be led by Mr. Gottgetreu, and the resumes for all professional staff members devoted to the Story County Housing Study and Needs Assessment are presented below.

Robert M. Gaudin, Operating Partner

Experience and Commitment. Mr. Gaudin has worked extensively for and with the private and public sectors for more than 40 years, from advising officers of large companies to aiding junior employees of small government entities. This broad experience with how both private industry and public sector planning is started, designed, implemented, and completed adds great value to the projects he oversees.



His expertise in economic and demographic research, housing market analysis, modeling and forecasting, and strategic planning all aid in delivery of both creative ideas and innovative solutions that impart long-lasting enhancements to housing and community development projects. His understanding of salient issues and institutional barriers exemplifies his ability to fulfill the needs of the communities he serves. Mr. Gaudin has lead oversight responsibility for the housing market evaluations, such as Housing Profiles, Consolidated Plans, needs assessments, Analysis of Impediments to Fair Housing Choice, and many other housing, economic, and demographic studies conducted by WES for both private and public sector clients. Mr. Gaudin has been preparing Consolidated Plans and AIs for the entire operating history of the firm.

Mr. Gaudin’s comprehensive awareness of housing and community development issues allows broadly based but focused solutions to complex circumstances. His understanding of a myriad of technical details permits the merging of theory with realism. Since establishing WES more

than 34 years ago, Mr. Gaudin has enjoyed a loyal customer base due to his high ethical standards, his commitment to excellence, the trust and rapport shared with clients, and the results provided over the years.

Qualifications. Mr. Gaudin's consulting qualifications pertinent to housing and community development evaluations include design, stewardship, analysis, document preparation, and presentation of most studies conducted by WES. When HUD's Consolidated Plan requirements were first introduced, Mr. Gaudin led development of one of the nation's first AIs and respective Consolidated Plans for Housing and Community Development, including the detailed planning requirements contained within the housing market and needs assessment. Mr. Gaudin is the authorized representative of WES and is able to confer with chief elected officials and policy administrators on housing issues identified by WES, as well as represent clients before print and video press.

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Employment History

Operating Partner, Western Economic Services, LLC, 2016 through the present. Mr. Gaudin oversees operations of the firm, including bidding, budgeting, project planning, staff development, and internal planning and capital acquisition as well as manages selected key projects. Mr. Gaudin also manages the professional staff and still makes presentations before selected meetings, public sessions and conferences.

Director of Research and Planning, Western Economic Services, LLC, 1998 through 2016. Mr. Gaudin was the team leader. He designed WES's approach to all projects; provided quality controls and oversight; managed staff; liaised with all customers; and presented at meetings, public sessions, and conferences attended by WES.

Senior Economist, Western Economic Services, LLC, 1986–1998. Mr. Gaudin established WES in July 1986. During this phase of the company's development, Mr. Gaudin designed all projects, conducted statistical programming and model building, designed survey instruments, orchestrated all analyses, wrote client reports, and presented all research findings.

Senior Planning Analyst, PacifiCorp, 1980–1986. Designed, developed, and implemented integrated long-term forecasting and planning models. Prepared scenario planning and impact assessments. Designed and oversaw market research surveys, collected raw data, and performed economic and demographic analyses. Constructed residential customer forecasts depicting single-family, multi-family, and mobile home housing stock additions over 20 year forecast horizon.

Economist, Montana Governor's Office, Office of Commerce and Small Business Development, 1979–1980. Represented governor at various community development and economic development functions. Conducted technical analyses and prepared reports for distribution regarding prospective economic development targets. Provided additional research and analysis for the governor.

Economic Consultant, Sole Proprietor, 1978–1979. Provided secondary research and report writing to Montana Industries.

Educational Background

Post-Graduate Training, Business research methods, survey design, and systems theory, Portland State University, Portland, OR, 1993.

Master's Degree, Applied Economics, Portland State University, Portland, OR, 1985.

Bachelor's Degree, Political Science and Economics, University of Montana, Missoula, MT, 1978.

Timothy S. Gottgetreu, Director of Research

Experience and Commitment. Mr. Gottgetreu has an MA in Economics and is a Director at WES. He has prepared data and analysis for AIs, housing and community development needs assessments, housing market studies, Consolidated Plans, housing and population forecasts, and related studies. Mr. Gottgetreu has designed, constructed, and continues to development and operate all housing dashboards under the WES professional service umbrella. Mr. Gottgetreu's qualifications include evaluation, assembly, and reporting of data and related information in super-computing environments. He has conducted research in systems analysis, systems modeling, econometrics, and mathematical economics.



Qualifications. Mr. Gottgetreu also has conducted Consolidated Plan and AI research, housing market evaluations, and housing needs assessments for numerous client organizations, such as Dona Ana County, the New Mexico Mortgage Finance Authority, the Minneapolis/St. Paul region; the cities of Bentonville, Conway, Fayetteville, Fort Smith, Jacksonville, North Little Rock, and West Memphis in Arkansas; Rockford, Illinois; Tulsa, Oklahoma; Hamilton County, Ohio; the County of Los Angeles, California; and the states of Iowa, Louisiana, Minnesota, Mississippi, Montana, Nebraska, North Dakota, North Carolina, Oregon, South Dakota, Tennessee, Texas, and Wyoming.

Résumé

Employment History

Director of Research, Western Economic Services, LLC, 2016 to the present. Mr. Gottgetreu oversees production and delivery of all Profiles and Dashboards created by WES, provides quality controls and oversight; manages staff; liaises with customers; and Mr. Gottgetreu is also the key individual who makes presentations before client Boards, client conferences, and related presentation settings.

Manager of Economic Research, Western Economic Services, LLC, 2011 through 2016. Mr. Gottgetreu oversaw and implemented all model building and statistical programming activities. He was the lead researcher and analyst for WES's quantitative and qualitative project activities. This included development of findings and graphical interpretation of those findings. He was responsible for the development of selected comprehensive housing market and needs assessment reports.

Senior Economist, Western Economic Services, LLC, 2007 through 2011. Mr. Gottgetreu implemented most model building and statistical programming activities and was the advanced researcher and analyst of data for WES's project activities. This included assisting in the development of findings and graphical interpretation of those findings, and development of reports.

U.S. Commercial Service, U.S. Embassy, 2005. Compiled data, researched, and prepared market evaluations of selected Swiss markets and industrial sectors. Facilitated interactions between Swiss and American industrial firms.

SEI Private Trust, STC Asset Movement, 2004. Assessed and evaluated account transfer activity. Reconciled data. Managed selected computer processing programs.

Educational Background

Doctoral Study, Economics, University of Oregon, Eugene, OR, 2006–2007.

Master's Degree, Economics, University of Maine, Orono, ME, 2006.

Bachelor's Degree, Economics, Mary Washington College, Fredericksburg, VA, 2003.

Ray Robinson, Jr., Manager of Public Involvement

Experience and Commitment. Mr. Robinson holds a Bachelor of Arts in Political Science and has performed leadership, program management, and regulatory oversight of units of local, state, and federal government for nearly 20 years. He has given compliance workshops and trainings, implemented policy and procedures for labor standards, and conducted environmental, fair housing, and citizen participation activities.



Qualifications. Mr. Robinson's role is in using his skills in facilitating open and frank discussions in public input, public presentation, and public review settings, ensuring both compliance and accountability for the outcome and acceptance of WES research. He has been assisting with the public presentation and citizen engagement work with Housing Evaluations, Consolidated Plans, and AIs.

Résumé

Employment History

Manager of Public Involvement, Western Economic Services, LLC, 2016 through the present. Mr. Robinson assists in facilitating public discussion of Consolidated Plans, Annual Action Plans, Housing Needs Assessments, Analysis of Impediments to Fair Housing Choice and Assessment of Fair Housing reports.

Compliance Manager, Mississippi Development Authority, March 2011 to the present. Provide leadership in strategic planning and analytical studies. Organize and conduct statewide regulatory trainings and workshop.

Grants Management Development Specialist, Mississippi Development Authority. August 2008 through March 2011. Ensure grant recipient compliance; responsible for technical training, and monitoring.

Central Mississippi Program Manager, The Nature Conservancy, January 1997 – July 2008

Educational Background

Bachelor's Degree, Political Science, Jackson State University, May 1995.

Megan A. Brace, Sr. Project Manager

Experience and Commitment. Ms. Brace holds a B.A. in Urban Studies and an MPA. She has substantive experience in the housing and homeless fields in her profession. For the past five years, she has been charged with building Consolidated Plans for Housing and Community Development by using the eCon Planning Suite. Furthermore, as well as directing the research in preparation of AIs. She has been making presentations of findings for citizen engagement activities, to City and County officials, and other community involvement activities associated with this type of work. Ms. Brace's experience also includes reviewing land use code and city ordinances as well as in the context of barriers to fair housing choice. She is uniquely qualified to review current city and county standards under the lens of critical analysis and current best practices.



Qualifications. Ms. Brace continues working in the housing planning and service fields and has lead other researchers in the development of CDBG, HOME, ESG, HTF, HMIS, and HOPWA documentation. She also assesses and interprets local land use ordinances and policies, inspects zoning codes and related planning documents as they relate to promoting affordable housing and their relationship to encouraging affirmatively furthering fair housing. She has worked on these projects in the following states: Alabama, California, Colorado, Iowa, Florida, Georgia, Minnesota, Mississippi, Montana, Nebraska, New Mexico, North Dakota, Nevada, Texas, Virginia, and Wyoming, as well as the Commonwealth of the Northern Mariana Islands.

Résumé

Employment History

Sr. Project Manager, Western Economic Services, LLC, October 2016 through the present. Ms. Brace prepares housing needs assessments, Consolidated Plan documents, AIs, and creates and edits data charts, narratives, and maps in the eCon Planning Suite and AI. She conducts progress review meetings with clients and interacts with selected clients for the housing and community development needs assessment, Consolidated Plans and AIs.

Sr. Planning Analyst, Western Economic Services, LLC, May 2014 through October 2016. Ms. Brace assisted in the construction of Consolidated Plan documents, edited selected planning narratives, enters data charts, narratives, and maps in the eCon Planning Suite and AI, and conducted data collection verification activities for the Consolidated Plan and AI.

Affordable Housing Development Assistant, Townspeople, San Diego, 2012 through April 2014. Ms. Brace identified, evaluated, and negotiated partnerships with other organizations. She represented Townspeople at public input meetings. She was the primary grant author and lead CDBG application writer.

Planning Intern, City of Oceanside, CA, 2011. She was the primary author of City's updated density bonus ordinance, assisted City staff in updating Housing Element, and conducted field work and analysis of potential affordable housing sites.

Educational Background

Masters of Public Administration, California State University, San Bernardino, 2014.

Bachelor of Arts, Urban Studies, University of California, Berkley, 2010.

Brandon C. Giatti, GIS and Data Analyst

Experience and Commitment. Mr. Giatti holds an MS in Physics and an MS in Computer Science. He has conducted substantive research using SPSS statistical software as well as Python/Pandas, HTML5, CSS3, JavaScript/jQuery, D3.js, PHP, SQL and related programs. Since arriving at WES, he has used his strong computer and analytical background to research, analyze, and report on the unique issues and context of every project. He also uses his skills in GIS to perform spatial analysis and aid in the visual presentation of our findings. This latter skill is his main contribution to our Consolidated Plan and AI research and analysis.



Qualifications. Mr. Giatti's primary role is to analyze and present demographic, economic, housing, and other data for housing and community development projects, and assist the other analysts in the processing and evaluation of data. In particular, he applies his skills in thematic mapping and characterizing spatial relationships.

Résumé

Employment History

GIS and Data Analyst, Western Economic Services, LLC, November 2017 through the present. Mr. Giatti performs research, conceptual analysis, and writing of research documents; provides support to sophisticated statistical programming; interprets data results; and presents information in thematic mapping designs.

Development Analyst, Multnomah County Department of Community Assets, January 2017 through July 2017. Test applications used to maintain the data integrity of individuals in

the criminal justice system. Work with business analysts to address customer needs to ensure products meets customer specification

Educational Background

Master's Degree, Master of Science, Computer Science, Portland State University, 2018.
Master of Science, Applied Physics, Portland State University, 2016

Bachelor's Degree, Bachelor of Science, Computer Science, Portland State University, 2014. Bachelor's of Science, Physics, Cal State Long Beach, 2009.

Kristen M. Bennett, Operations Manager

Experience and Commitment. Ms. Bennett holds a BA in Liberal Studies and has a background in cultural anthropology. She conducts quality controls, data entry, and verification of source information on data presented in our reports. Additionally, she develops, edits, and implements our telephone, internet, and printed survey forms. She also enters Consolidated Plan narratives, data, tables, charts, and maps into the IDIS eCon Planning Suite for the Five-Year strategy as well as the Annual Action Plan. She has been assisting with the preparation of Consolidated Plans and AIs since 2012.



Qualifications. Ms. Bennett provides assistance to the team and her focus area is in support of document design and production, quantitative analysis, and survey designs. She also creates high quality formatted documents in InDesign. She has assisted in the analysis, evaluation, and preparation of documents for Alabama, Colorado, California, Georgia, Ohio, Minnesota, Mississippi, Montana, Nevada, New Mexico, Nebraska, North and South Carolina, North Dakota, and Wyoming, as well as the Commonwealth of the Northern Mariana Islands.

Résumé

Employment History

Operations Manager, Western Economic Services, LLC, 2017 through the present. Ms. Bennett manages the survey team, conducts research and analysis, prepares and edits various presentations, phone, internet, and printed survey instruments. She is also in charge of office operations, being sure that it runs smoothly and effortlessly.

Operations Supervisor, Western Economic Services, LLC, 2014 through 2016. Ms. Bennett oversaw survey data collection, document production, and related operational tasks. She assisted with the collection of socio-economic and demographic research and analysis, data verification, and survey support and analysis.

Assistant Analyst, Western Economic Services, LLC, 2012 through 2013. Ms. Bennett conducts data collection, socio-economic and demographic research and analysis, data verification, and survey support and analysis.

Survey Assistant, Western Economic Services, LLC, 2011 to 2012. Coordinated telephone activities, data entry, and related aspects of survey research projects. Monitored quality and productivity. Responded to client and respondent requests. Participated in telephone interviews.

Intern, Marathon Education, 2010. Re-organized comprehensive database to track sponsor and recipient funds. Ensured accuracy of data through telephone and other research.

Educational Background

Bachelor's Degree, Liberal Studies, Portland State University, Portland, OR, 2012.

Associate of Arts, The Community College of Baltimore County, Maryland, 2000.

Kathryn L. Rosson, MBA, PMP, Information Systems Manager

Experience and Commitment. Ms. Rosson holds an MBA, a BA, and a Project Management Professional certification. She has a diversified background in information technology project management; she provides technical support for all WES technology related functions, including client/server, business applications and operations efficiency. She has provided information technology and application assistance for WES projects implemented in California, Georgia, Iowa, Ohio, Minnesota, Montana, New Mexico, Nebraska, New York, North and South Carolina, Tennessee, and Wyoming.



Qualifications. Ms. Rosson's skills include Web Design, HTML, CSS, and SharePoint technologies; she manages our network; and, she is an expert in integrating the MS Office Suite applications including MS Expressions and InfoPath.

Résumé

Employment History

Information Systems Manager, Western Economic Services, LLC, 2012 through the present.
Ms. Rosson maintains network hardware and software, aids in administering video conferencing, and confirms the certification and licensing of WES software developed products. She manages software installations and creates web based documents.

Project Manager, Mountain Glass, 2002 to 2011. Migration of Windows 2000 network to SB2003. Managed MS Exchange 2003, Active Directory and MS Live Communications. Configured Remote Web Workplace.

Educational Background

MBA, Sustainable Business, Green Mountain College, Poultney, Vermont, May, 2016

Bachelor's Degree, Sustainable Business, Marylhurst University, Portland, OR. June 2014

Certified Project Management Professional, Project Management Institute, June 2013

Spencer C. Keating, Research Assistant

Experience and Commitment. Mr. Keating joined the firm in November of 2018. In this short time, he has assisted with WES AI projects for clients in Mississippi and Florida., as well as other projects in Nebraska, Wyoming, and Iowa. His role has expanded quickly and he reviews documents, conducts programming, and other data collection and verification activities.



Qualifications. Mr. Keating is a recent graduate specializing in statistical regression analysis, qualitative and quantitative problem solving, and data preparation and analysis.

Résumé

Employment History

Research Assistant, Western Economic Services, LLC, November 2018 through the present.
Conduct secondary research, assist other researchers in preparation of studies, reports, and analytical programming. Proof read documents

Data Recovery, University of Oregon, Department of Earth Sciences, 2016.

Educational Background

Bachelor's Degree, Economics, University of Oregon, 2017

IV. Proposed Approach

A. Purposes, Goals, and Objectives of this Project

The overriding *goals* of this project are very simple. We wish to produce housing research and planning documents that have sprung from a County-wide collaborative effort that has drawn upon the diverse knowledge and experiences present in the County, uniting people around the same table and engendering a shared community vision. It will be applicable to the unincorporated areas and all cities in the County, except Ames, even if the phrase “county” is used. Furthermore, the scope of work that WES is proposing has three main design parameters to aid in assuring the County of successful attainment of these goals. These are: surveys that guarantee respondent anonymity, an open and transparent process, and a strong blend of quantitative and qualitative analysis.

The Guarantee of Anonymity, as part of the survey processes, is designed to foster trust, allowing people to feel open and expressive about where they see difficulties, complications and nuances within the housing arena. These feelings, opinions and expressed preferences will only be reported anonymously. Building a cooperative team, encompassing the broad array of opinions and differing feelings within the community, and respecting diversity are imperative.

The Open and Transparent Process associated with the entire deliberation, but especially the additional optional public input and public involvement opportunities associated with the housing study is designed to bring both providers and consumers of housing activities to the table in a non-threatening environment, one lacking any judgmental overtones. Our emphasis is to build a constructive setting, exchanging information and experiences and engendering a team spirit, one that works toward building consensus about the County’s housing needs. With a neutral yet exploratory tone, the process emphasizes consensus building and reaching conclusions together as a team.

The Blend of Quantitative and Qualitative Analysis represents our best efforts to build only the most balanced, even and strong cases relating to housing needs. Both analytical approaches will be used to reinforce each other, thereby avoiding wishful, unsupportable or inflammatory pronouncements. These scientific approaches will be used to bridge differences in perceptions and focus on measurable goals and identifiable objectives relating to building a viable community future.

While one *objective* of this process is to prepare this study efficiently, another is participating in the review, development and refinement of the longer-term community vision. This vision is created out of the cooperative efforts of individuals in the County and other stakeholders in the planning process. WES will ensure that such vision and the strategies and planning objectives derived from the vision reflect both the needs and desires of the County and actions the County and its member communities may take.

B. Background on the Story County Housing Study and Needs Assessment

The County wishes to better understand the affordable housing needs of citizens throughout the County by conducting a comprehensive housing evaluation, the Story County Housing Study and Needs Assessment. The evaluation will identify gaps between supply and demand for the entire market, as well as specific submarkets within each of the cities, sans Ames. In gaining this heightened understanding, the County will also improve, enhance, expand, and make more readily available information about homeownership and rental housing needs throughout the County and how it may differ among the member communities, again without Ames.

One objective is to provide current, high-quality, relevant information about the factors that influence the development, production, use, rehabilitation, demand, and need for housing and housing services in the County. Plus, having this information will enable the County and Cities to better design its programs to target unmet housing needs, identify gaps in the affordable housing delivery system, and better discern the sometimes-subtle differences between housing needs in various areas of the County.

The goals of this study are to enrich policy formation and decision-making capacity, interpret and predict affordable housing needs within the County, and better inform others when making choices among housing alternatives. The results of these research efforts will assist planners, developers, lenders, and local government agencies, non-profit and for-profit organizations, and the County, as well as other providers of affordable housing and housing-related services operating in County. The County will be in a much better position to make effective policy choices that affect the County and the County's ultimate role in promoting affordable housing choices for the citizens of the County and its member communities, excluding Ames.

Western Economic Services, LLC, national leaders in this type of work, will be addressing all components of the project requirements, as described herein. Most parts of the Housing Study and Needs Assessment will demand significant research effort to create. Attaining these requirements encompasses a complicated set of analyses and tasks, as described in this proposal response.

Furthermore, WES envisions this work as potentially shedding new light on housing topics, therefore possibly uncovering new and pressing issues. In our research activities, a significant amount of new data will be created, addressing current and emerging problems. WES will highlight trends in affordable housing development, complexities encountered in residential rehabilitation, influence on housing preferences, rising or declining housing demand, and prospective gaps in the ability to deliver housing and related development services, among other important considerations. Hence, WES will address all components of the project requirements described herein, such as:

- Working closely with the County to refine and further develop this work plan for the Housing Study and Needs Assessment.
- Conducting all the specified research and analysis, fulfilling the County's requirements for very detailed aspects of the planning process. WES has previously prepared these studies for many other jurisdictions and is familiar with the limitations and operational challenges faced with capturing these particular sets of quantitative data.
- Conducting a County-wide survey of housing demand, the 2020 Housing Needs Survey, so that individual submarkets are uniquely identified, thereby gathering perspective and commentary about the nuances of housing preference, housing demand, and locational desires.
- Collecting from the Woods & Poole Economics, Inc. a population forecast that will then be converted to a housing demand forecast over a twenty-year horizon, by tenure and income, including those factors that were expressed in the housing survey, such as housing dwelling type.
- Holding monthly progress review Webinars with County staff as well as submitting progress review memos biweekly until the Draft Housing Study and Needs Assessment is submitted. This ensures that the County is continuously appraised of the Housing Study and Needs Assessment development process.

- Carefully coordinating the Housing Study and Needs Assessment and providing Preliminary Draft for internal staff review, Drafts for Public Review and Final Report. The report will each contain an Executive Summary and will also have more detailed information that addresses the plan development process, the housing profile of the county and each city, the housing forecast, and preferences expressed in the 2020 Housing Needs Survey.

Explicitly, the Housing Study will inspect the current affordable housing market, demand and supply of rental and homeownership units at various household incomes. Existing local market trend data will depict the status and direction of the affordable housing market. Having this information together will aid in providing for recommendations for policy changes to promote greater availability of affordable housing units and the investment of public funds devoted to affordable housing.

On the other hand, the purpose of the Housing Study and Needs Assessment is to take the data collected and view the future of the entire County housing market, anticipating the demands of the market over the next twenty years, by tenure and income. This will be implemented in two fashions. One will be to develop a housing demand forecast, by tenure and income group. The second will be by implementing the 2020 Housing Needs Survey, a survey of residents of the County gathering housing choices or preferred housing choice over the future, and the attributes that best help them make a housing location decision. All of this is intended to aid the County and each City with forming improved policies, initiatives, and prospective regulations to facilitate the creation of these affordable housing futures and alternatives.

C. The Research Methodology Task Discussion

WES views the research methodology employed here as comprising five key activities: primary research, secondary research, quantitative analysis, qualitative analysis, and public involvement. Each are defined below and include a more detailed narrative explaining activities to be undertaken during each of these methodological steps.

Task 1. Primary Research. Primary research is defined as the collection of data that does not yet exist. In general, such activities involve using a survey instrument, whether implemented via the internet, on-site visits, exit interviews, telephone, mail, or video recording. For the work performed by WES, data is collected by asking for a response to a statement, in written or spoken form. Responses can be open (i.e., “Tell me what you think”) or closed (i.e., “Select one of the following choices”). WES uses predominantly online, mail, and telephone surveys.

The primary research activities will begin with the 2020 Housing Needs Survey. This will be an online survey instrument, announced through a mass-distribution email to stakeholders, citizen advocates, policy makers, and the general public soliciting their input to their perceptions of the housing market, and its health, vitality, current status, and the County’s housing needs. WES will also be using this instrument to address perceived housing barriers, current housing challenges, and the types of visions respondents to the survey may have for the future of the County and its member Cities.

The surveys will aid in identifying unfolding housing demand, housing supply, housing suitability and accessibility, community sentiment regarding affordable housing, and housing barriers experienced by both consumers and providers of housing and housing related services. This will include both private sector and public sector issues related to rehabilitation, redevelopment, and new construction. The surveys will also be available for distributing in hard-copy format, such as at meetings, City and municipal offices, and other locations. The 2020 Housing Needs Survey is designed to collect community sentiment about existing and

future housing needs of existing residents and the desired direction that the community should go with its housing market.

As an additional primary research task, WES will also conduct a telephone based Rental Vacancy Survey to determine the current vacancy and absorption rates, by number of bedrooms, for both market-rate and income-restricted units throughout the County and its member communities.

WES is also proposing that the County incorporate **Option I - Three Focus Groups** comprised of three meetings with 12 to 15 people in each meeting. Each group will then discuss one of three topic areas at much greater length and depth: the needs with the rental housing market, the need for new construction for permanent residents, and the need for the preservation of existing affordable housing for residents. All these topics would aid in focusing the definition of housing needs more sharply, given the circumstances we might see from these topic areas and the differences in the communities within the County.

Task 2. Secondary Research. Secondary research is the collection of information that already exists. Simple examples might entail downloading 2010 Census or 2018 ACS data or collecting and processing building permit data and employment and income statistics. Secondary research activities can be very complicated, due to the large variety of competing and sometimes contradictory data sources. WES understands how to determine which sources are reliable and which are not valid.

WES will define current population and household profiles for the County and each City, including density of low-income, middle-income and high-income households; vacancy rates and the disposition of the vacant housing stock; housing values; the percentages of income spent on housing; the numbers of households in certain income brackets, including those in poverty; housing tenure and overcrowding; housing cost burdens; housing conditions; and other demographic and housing data from the decennial Censuses and the 2018 ACS. This research includes assessment of the existing stock in terms of demand and supply.

WES will determine vacancy and absorption rates by soliciting input from real estate agents by requesting information from their multiple listing service, several on-line MLS entities such as Redfin or Zillow, as well as by using the telephone based Rental Vacancy Survey concerning rental properties in the County. Additionally, WES will create geographic maps depicting several of the concepts mentioned above, using 2010 Census and 2018 American Community Survey data. Shown by Census tract, visual representation of these data will help explain the housing needs and the status of the housing market.

Task 3. Quantitative Analysis. This type of analysis results in numbers. Specific values are identified through econometric analysis and forecasting, optimization, linear programming, cost/benefit analysis, or other types of evaluations. Sometimes this analysis is very simple, such as computing the disproportionate share of a particular population; other times the analysis can result in a very broad set of numbers, such as a 20-year housing demand forecast that results in predicting household formation by tenure by income for specific household types. WES is highly skilled at developing and managing large data systems, particularly those appropriate for the Housing Study desired by the County

Properly scaling the quantitative analysis must be done with care, as two basic needs must be met: one pertains to the short-term needs of the County, its housing, and the demands faced over the upcoming years; the other relates to the long-term vision that the County may wish to entertain for its overall housing planning environment. WES will assist the County in neatly uniting these processes.

WES will identify the number of households in need of housing for extremely low-income, low-income, moderate-income, and middle-income families; and renters and owners. Many of these details can be extracted from the 2010 Census as well as the 2018 American Community Survey. Through these primary and secondary data collection activities, WES will be able to quantify the County's housing needs, not only for today, but of the forecast horizon.

Task 4. Qualitative Analysis. WES defines qualitative analysis as the evaluation of data related to non-numerical values, such as assessing expressed opinions and feelings. Many of the data for this research activity come from primary research activities, such as the surveys mentioned above, and in the interviews to be addressed below in Task 5. In the housing evaluation arena, qualitative analysis is very important, since needs are often ranked in terms of their relative importance to the community. WES uses qualitative analysis to capture and express the opinions, feelings, and preferences of the survey respondents as they relate to housing, the demand for housing, the provision of housing, and housing-related services. This type of analysis will play a key role in the Housing Study and Needs Assessment.

When looking ahead toward public policy decisions and the ability of the collective to reach an agreement on the prioritization of need, one cannot plant the seeds of accommodation too soon. Securing citizen, stakeholder, and agency involvement in an organized, non-threatening, constructive environment is a critical element to the success of the project.

With that in mind, WES will reach out and directly contact members of various groups and interested parties via the survey instrument at the onset of this planning process. There are two very important reasons for contacting these groups: collecting valuable data about housing needs, and gathering additional information that will likely be volunteered by respondents regarding perceived needs and barriers. WES will also use the survey instrument as a method to promote additional citizen participation.

Data collected will be broad and address several perspectives, including those of real estate agents, property managers, representatives from local government, and developers. The facts, opinions, perceptions, ideas, solutions, resolutions, or even complaints gathered through these surveys will not alter, mold, or specifically influence the quantitative analysis discussed above. Instead, these activities will enhance it. These are feelings not prone to simple numerical manipulation, but are presented more in terms of such things as hopefulness, optimism, or concern. Such opinions can guide the County in setting a prioritization scheme for the quantified housing needs noted above.

Task 5. Public Involvement. Public involvement is a requirement for preparing a superior Housing Study and Needs Assessment; and WES suggests that it should be a part of this evaluation process in order to accurately assess the level of perceived need in the County. WES is proposing that the County hold an **Option II - Stakeholder Consultation Webinars** which are to be held during Phases II and III of the planning process. The second public involvement opportunity will arrive after release of the Draft Report for Public Review and during a formal presentation of findings. WES is unequivocally committed to an open and transparent process and believes that the best approach is for WES to make a presentation at the Public Review Meeting.

D. The Five Step Process for the Housing Study and Needs Assessment

WES envisions this assessment being initiated fairly soon. The Housing Study and Needs Assessment will cover several general topic areas: depiction of the economic and demographic change and current housing trends, the demographic picture of the County and each City's housing inventory, its' housing market conditions; the current and emerging housing issues, and housing

gaps and estimated housing needs, by tenure, and income today and in the future. This will include an assessment of the County's capacity for such growth. Completion of the Housing Study and Needs Assessment will be implemented in five phases.

Phase I – Project Initiation starts with an Orientation Meeting to confirm our respective responsibilities, the schedule, and product deliverables. By this time, the County may have elected to conduct **Option III – Ames Housing Study and Needs Assessment**.¹ During the orientation, we will also review several pieces of information, such as the draft 2020 Housing Needs Survey. WES will also receive some data from the County, such as any assisted housing or any available public housing inventory database.

Phase II – Data Collection and Analysis represents data collection and evaluation of that information, including periodic progress review meetings with County staff. This will include evaluation of economic, demographic, and housing information from the 2000 and 2010 Censuses, the 2018 American Community Survey (ACS), the Bureau of Economic Analysis (BEA), the Bureau of Labor Statistics (BLS), and local real estate agents and property managers. Phase II will incorporate a housing market inventory, including recent permit activity and the number of units under production, housing prices, rent levels, vacancy rates, the location and distribution of public housing, and an assessment of housing demand over the next 20 years. Further, it will also include implementing the survey of selected stakeholders and residents with a web-based survey instrument called the 2020 Housing Needs Survey, which will gather data about perceptions of housing needs and housing demands throughout the community. As well, it will include extraction of a set of residential properties, and commercial properties used for residential purposes, from the County Assessor in the inspection of the physical condition of the properties.

Phase III – Staff Review incorporates the preliminary quantitative and qualitative findings from Phase II and offers them to the County staff. Outreach and involvement of both stakeholders to the 2020 Housing Needs Survey and the general public will be useful in identifying a commonly held vision for the future of housing, including market-rate and affordable and public housing, by tenure. This phase also begins development of the preliminary strategies and prospective actions associated with the identified housing needs and housing gap.

Phase IV – Consolidation of Information into the Housing Study and Needs Assessment represents the preparation of a Draft Report for Internal Review. It incorporates the findings with internal strategy sessions; identifies housing and homeless needs; and explores strategies to address the needs, including actions the County can consider in addressing housing needs and gaps. WES will ensure that the description of such items fit logically and easily into the overall planning and reporting system envisioned by each of the Cities and the County.

Phase V – Presentation of Assessments to Council/Public concludes the project. WES will provide a Draft Report for Public Review, make a formal presentation at any venue so desired by the County, receive comments from County and other interested parties, and then submit the final report to the County.

E. A Restatement of Services Required

The following proposed work plan is structured in an outline format, describing details about our steps, analysis, methods, results, and deliverables. The primary emphasis is in the technical

¹ To be described more fully in Section V – Proposed Budget.

methodologies and research and timing of product deliverables that accompany our proposed fixed-price budget. In all cases, it excludes the City of Ames.

Step I – Orientation

- A. WES will initiate organization and preparation of work quickly after execution of the contract, expected to occur in January of 2020.
- B. Mr. Tim Gottgetreu, Director of Research at WES, will meet with County staff to conduct an Orientation Meeting. That may be held via Webinar. This meeting will have the following purposes:
 - 1. WES will discuss the protocols used for the 2020 Housing Needs Survey and present the initial correspondence to be e-mailed to the survey participants along with the draft survey instruments. WES will make any suggested modifications to these instruments at that time and put them into production soon thereafter.
 - a. This e-mail communication will also include links to the online survey as well as instructions on how to complete the survey.
 - b. The County will be the entity that distributes the e-mail announcement of the surveys, although they may instruct others to participate in the distribution of the survey.
 - 2. Exchange information and discuss the content, tone, analysis methods, expectations, and schedule of deliverables.
 - 3. WES and the County will discuss Option I - Three Focus Groups. This are to occur during one visit to Story County and last up to 90 minutes. WES will prepare the discussion materials, PowerPoint presentations, and hand out agendas. WES will audio record these sessions and prepare a set of transcripts.
 - 4. WES and the County will discuss Option II - Four Stakeholder Consultation Meetings, to be held via Webinar and designed to keep interest in the Housing Study throughout the process.
 - 5. WES and the County will review and set tentative dates for the number of other progress review meetings that WES may need to attend. The fixed budget calls for four visits to the County.
 - 6. WES and the County will discuss the data extract that is to be presented to the County Assessor, to aid in identifying run-down or otherwise dilapidated housing.
 - a. This effort will request for all residential dwellings, in digital processing format (machine readable), containing such variables as property address (address and town in different fields), physical condition, number of bedrooms, gross living area, year built, gross assessed value, and parcel ID, among other variables. This will include commercial property used for residential purposes, comprising apartments above, and manufactured or mobile homes not on a permanent foundation.
 - b. For residential units with a physical condition of poor or less, we may make a second request for photographs to illustrate the physical condition of these units in the document.
 - c. This will take the place of the 15 drive-by inspections of lower quality homes in each community. Hence, the County will have ALL residential properties in the County having a physical condition of poor or less, not just a random selection generated by a drive-by observation. This methods is significantly better and less prone to data errors.
- C. Within three days of the Orientation Meeting, WES will submit the first progress review memo. It will document the tone and content of the meeting, as well as any understandings shared at the meeting. Progress review memos will follow bi-weekly thereafter as they relate

to work conducted on the Housing Study, until submittal of the Draft Report for Internal Review.

Step II – Data Collection and Analysis

- A. WES will begin extracting pertinent economic, demographic, and housing data from the 2010 Census, the 2018 American Community Survey, and other related sources.
- B. WES will offer perspective on trends seen in the data, as it relates to each city and the County in its entirety. Key data include:
 - 1. Population;
 - 2. Households by tenure and average household size by tenure;
 - 3. Household and family income, by income range;
 - 4. Percent of income spent on housing by tenure, including cost burdens;
 - 5. Median rents and home values;
 - 6. Rental and homeowner vacancy rates;
 - 7. Number of housing units, by type;
 - 8. Units with incomplete plumbing or kitchen facilities; and
 - 9. Overcrowding and severe overcrowding in households.
- C. WES will extract pertinent economic, demographic, racial composition, ethnicity, and age cohort data from the 2010 Census and the 2018 ACS data releases for the County. Some key data elements to be evaluated include:
 - 1. Households, by size;
 - 2. Households having less than 30 percent Median Family Income (MFI), 31 to 50 percent MFI, 51 to 80 percent MFI, 81 to 95 percent MFI, and above 95 percent MFI, segmented by household size, owner and renter households, and elderly and small and large renter households;
 - 3. Population by race and ethnicity;
 - 4. Age cohorts of the population;
 - 5. Disabled individuals;
 - 6. Housing tenure; and,
 - 7. Households experiencing housing cost burdens, overcrowding, and lack of complete plumbing or kitchen facilities for the year 2017.
 - 8. Racial and ethnic concentrations;
 - 9. Disability status of the civilian non-institutionalized population;
 - 10. The number of people in poverty;
 - 11. Racial, ethnic, and poverty concentrations will also be provided in geographic maps, with areas of high concentrations and disproportionate shares explicitly cited.
- D. WES will collect additional pertinent economic, demographic, and housing data, to include:
 - 1. Cost burden and severe cost burden, overcrowding and severe overcrowding;
 - 2. Disability by age;
 - 3. Number of households by household income range;
 - 4. Population by gender, age, race, and ethnicity;
 - 5. Poverty by age, individuals in poverty;
 - 6. Number of housing units with incomplete kitchen or plumbing facilities.
- E. WES will prepare several geographic maps that display many of the concepts presented above by Census tract.
- F. WES will evaluate all completed housing needs surveys and process the data.
- G. WES will collect rental agency addresses and phone numbers and complete the rental vacancy and absorption rate telephone surveys. WES will also draw upon online apartment rental rates to compare with these results.

- H. WES will analyze the building permit data from 1980 through 2018 for single-family, duplexes, tri- and four-plex buildings and multi-family structures with five or more units. Value of single-family new construction will be analyzed over this same time period as well.
- I. WES will contact the local real estate multiple listing service (MLS) entity and collect the for-sale inventory and listing prices, as well as recent sales prices, if it is willing to share this information. WES will also access the on-line MLS resources, such as Redfin or Zillow. The on-line MLS data has an advantage in that WES can inspect specific market niches and geographic locations of affordable housing.
- J. WES will collect available labor force, employment, and unemployment statistics at the County or City level. These data will span at least the 1990 through 2018 time period.
- K. WES will collect forecast data from the Woods & Poole Economics, Inc. WES will then convert this population forecast to households by income by tenure for each of the communities in the County.
- L. WES will collect BEA information describing full and part-time employment from 1969 through 2017, for the County.
 - 1. This information will also include real average earnings per job, per capita income, dividends, interest, and rental income, and total personal income over the same time period.
 - 2. It will also be used to describe the economic base of the County and the degree that the economy can sustain itself.

Step III – Preliminary Housing Needs Assessment

- A. WES will complete the on-line housing needs survey process and analyze the survey responses.
- B. WES will begin drawing inferences from all previous quantitative and qualitative analyses of data. These inferences will fall into one of the following categories:
 - 1. Housing market conditions, including the affordability and availability of current housing given current incomes. The entire housing market will be segmented by tenure (rent or own) as well as by income (the income categories noted above).
 - 2. Barriers identified by respondents to the surveys, including households experience housing problems. Such problems are defined as having one or more of the following problems: overcrowding, severe overcrowding, cost burdens, severe cost burdens, or lack of complete plumbing or kitchen facilities. WES will determine the number of households experiencing problems in each of these problem categories as well.
 - 3. Perceived needs for new and rehab housing, by tenure.
- C. These inferences will address degree of need for affordable housing and housing related services, comprising such things as:
 - 1. Quantitative findings presented in tabular and graphic forms,
 - 2. Qualitative findings presented as itemized lists of expressed needs, and
 - 3. Other issues such as expressed barriers to affordable housing.
- D. WES will complete a housing demand forecast, by tenure and income for the County. This housing demand forecast will extend at least 20 years and define households by tenure (rent versus own) and by income for those income groups identified above).
- E. WES will summarize the results of work conducted to date and submit the information as a Progress Review Memo. The information contained therein, along with other data collected for the housing study, will form the basis for the Staff Meeting presentation. It will include a discussion of barriers to housing development, including institutional issues and the regulatory environment. Such barriers will be identified in the housing needs survey.

- F. WES will submit a Progress Review Memo of these concepts, notions, and issues, as well as all shared understandings and agreements.

Step IV – Preparation and the Housing Study Strategies

1. WES and the County will meet to verify preliminary findings that will be released with the draft report, including housing needs, and recommended actions and strategies, and related issues and actions associated with the Housing Study and Needs Assessment.
2. WES and the County will discuss prospective strategic objectives, goals, and alternative or possible performance measurement criteria. Such discussions will include the following:.
3. Some discussion about tactics useful for achieving the objectives will also be addressed. The topics may include:
 - a. Housing needs and suggested prioritization schemes,
 - b. Options for strategic goals and objectives,
 - c. Other criteria to measure progress toward attainment of strategic goals, and
 - d. Reduction of barriers to the development and preservation of affordable housing.
4. WES will begin preparing the Draft Reports for Internal Review.

Step V – Draft Report, Public Review, and Final Report

1. WES will incorporate all previous data, analysis, needs assessment, and evaluation of strategic objectives and submit a Draft Reports for Internal Review.
 - a. The document will include an executive summary.
 - b. The report will contain a detailed discussion of the current socio-economic context, the housing inventory, the housing market, a housing needs assessment with identification of gaps, and other reference data and narratives. It will include each element of items one through seven in the request for proposal and on RFP pages 2 through 5.
 - c. It will also offer recommendations for each community, the unincorporated areas of the County as that pertains to housing needs by tenure and income, present best practices for the County, review prospective land use regulations and land use maps.
 - d. It will also identify potential developers and suggest strategies and goals for development.
 - e. The draft report will also address potential revenue streams, incentives, and prospective opportunities for promoting affordable housing.
 - f. The Draft Report for Internal Review will be submitted.
2. WES is to receive comments back from the County within two weeks. WES will then deliver the Draft Report for Public Review.
 - a. The draft report will identify existing barriers to production of housing, whether regulatory, market, institutional, labor shortage, or other pertinent barriers.
3. WES will receive final comments about the Housing Study and Needs Assessment and then submit the final report on or before October 2, 2020.

F. Anticipated Schedule

The anticipated Schedule is presented on the following page.

Exhibit I Proposed Schedule by Month

A week is equal to "●"

Tasks	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Meetings with the County	●	●	●	●	●	●	●	●	●	●	●
Phase I – Orientation											
WES receives executed contracts	●										
WES prepares agenda materials and emails them to the County	●										
WES orientation meeting occurs	●										
WES submits progress review memo	●										
WES initiates data collection	●										
Phase II – Data Collection, Analysis, and Preliminary Findings											
WES begins building the rental survey database	●●●●										
WES begins collecting economic and demographic information	●●●●●										
WES begins collecting housing information	●●●●●										
WES initiates rental vacancy survey	●●●●●	●●									
WES and County conduct progress review meeting			●								
WES continues collection 2010 Decennial Census and 2018 ACS			●●	●●							
WES and the County conduct progress review meeting				●							
WES draws inferences about county population change				●●	●●						
WES draws inferences about county economic change					●●●						
WES draws inferences about county housing demand					●●●						
WES draws inferences about impediments to fair housing choice					●●●						
WES makes PowerPoint presentation before staff						●					
WES and County discuss plans						●●					
WES begins assembling all the data into system of analysis						●●●					
WES begin preparation of draft documents						●●●					
Phase III – Draft Reports, Presentation, and Final Reports											
WES submits Draft Reports for Internal Review,							●				
WES receives comments on Draft Reports for Internal Review							●				
WES makes presentation								●			
WES edits document									●		
WES submits Final Report										●	

G. Property or Services Furnished by The County

The following itemizes the property or services anticipated from the County.

G.i. Property or Services Furnished by the County

The following items are to be provided to WES by the County:

1. One e-mail list of in-need service providers, organizations, interested individuals, advocacy groups, for-profit, non-profit, and government agencies, bankers, lenders, Realtors, property managers, and other entities that provide or are interested in housing and community development services. This list is to include agencies, organizations and interested parties that may be considered stakeholders in the Housing Study process. The list can be of any size and is herewith termed the "agency survey list." Prospective contacts for the surveys should include representatives of the following groups:
 - a. Housing builders and developers;
 - b. Non-profit and agency housing providers;
 - c. Local government representatives, such as those involved with building codes, zoning, planning and related issues;
 - d. In-need service providers, such as entities providing housing services to those with mental or physical disabilities, the homeless, victims of domestic violence, farmworkers, ethnic and other advocates, and related groups;
 - e. Bankers, lenders and mortgage brokers;
 - f. Realtors and real estate agents;

- g. Assisted and market rate property managers;
 - h. Fair housing and low-income constituencies;
 - i. Other special interest or special in-need organizations; and
 - j. Other representatives of agencies of City or County government.
2. A data extract from the Story County Assessor, the details of which will be supplied at the Orientation Meeting, but is generally discussed herein.

The following services are to be performed by the County:

1. Selection, acquisition and coordination of all public meeting places for any public input or public review meetings. Prospective dates for these will be discussed at the Orientation Meeting.
2. Invite stakeholders to participate.
3. Public notification of the public input or public review meetings, and related planning process notifications and public relations activities.
4. Translating any materials into other Non-English languages, other than the Spanish version of the resident survey, will be provided by the County.

G.ii. Property or Services Furnished by WES

WES will furnish, collect, purchase or otherwise obtain all other materials not listed in Section G.i, immediately above.

V. Proposed Budget

A. Proposed Budget

The following represents the sum of all our labor categories, estimated hours, hourly rates, purchased materials, travel expenses, and other related direct costs for completion of the Story County Housing Study and Needs Assessment. It includes all preparatory and progress review meetings, data processing, analysis of findings, development of draft and final reports, research presentations, and interagency and related coordination activities. Western Economic Services is proposing to provide the products and services described above on a “fixed cost” and not-to-exceed basis. These estimates may be modified if significant changes to the scope of work or contract conditions occur.

Staff Costs	Rate	Hours	Total
Mr. Robert M. Gaudin, Operating Partner	275	8	2,200
Mr. Timothy S. Gottgetreu, Director of Research	200	103	20,600
Ms. Megan A. Brace, Sr. Project Manager	180	108	19,440
Mr. Brandon C. Giatti, Data & GIS Analyst	125	18	2,250
Ms. Kristen M. Bennett, Operations Manager	110	4	440
Mr. Spencer C. Keating, Research Analyst	90	76	6,840
Clerical/Surveyors	65	56	3,640
Subtotal			55,410
Production Costs	# Units	Unit Cost	Total
Airfare	4	300	1,200
Lodging	4	125	500
Meals	4	60	240
Car rental	4	100	400
Shipping and Delivery	1	75	75
Subtotal			2,415
Total Estimated Budget			57,825

There are also two optional tasks, priced as follows:

Option I – Three Focus Groups	\$5,150
Option II - Four Stakeholder Consultation Webinars	\$4,250

By the time of the Orientation Meeting, the County will need to decide to accept Option III – Ames Housing Study and Needs Assessment, which will be rolled into this study and address items 1 through 7 on RFP pages 2 through 5. While the County can decide later, the cost cannot be guaranteed. :

Staff Costs	Rate	Hours	Total
Mr. Robert M. Gaudin, Operating Partner	275	0	0
Mr. Timothy S. Gottgetreu, Director of Research	200	44	8,800
Ms. Megan A. Brace, Sr. Project Manager	180	62	11,160
Mr. Brandon C. Giatti, Data & GIS Analyst	125	12	1,500
Ms. Kristen M. Bennett, Operations Manager	110	4	440
Mr. Spencer C. Keating, Research Analyst	90	14	1,260
Clerical/Surveyors	65	0	0
Total			23,160

Each community is free to elect to have WES attend additional local meetings or public involvement processes, as mutually agreed and negotiated.

VI. References

A. WES References

1. Ms. Joan S. Duckett, Community Planning & Development Division Chief, Prince William County Office of Housing & Community Development, 15941 Donald Curtis Drive, Suite 112, Woodbridge, VA 22191, (p) 703-492-2300 (f) 703-492-0499, jduckett@pwcgov.org
2. Mr. Scott Hoversland, Executive Director, Wyoming Community Development Authority, 155 North Beech Street, Casper, WY 82602, (p) 307-265-0603, (f) 307-266-5414, hoversland@wyomingcda.com
3. Ms. Terri Rosonke, Housing Programs Manager, Iowa Finance Authority, 2015 Grand Avenue, Des Moines, Iowa 50312, (p) 515-452-0440, (f) 515-725-4901. Terri.Rosonke@lowaFinance.com

PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.



PREPARED BY:

HANNA:KEELAN ASSOCIATES, P.C.
COMMUNITY PLANNING & RESEARCH

DECEMBER 13, 2019

HANNA:KEELAN ASSOCIATES, P.C.

COMMUNITY PLANNING & RESEARCH

PRINCIPALS:

Becky J. Hanna
Timothy M. Keelan

December 13, 2019

Story County Auditor's Office
c/o Leanne Harter
County Outreach and Special Projects Manager
Story County Administration
900 6th Street
Nevada, Iowa 50201

**PROPOSAL: Story County & Communities, Iowa
Housing Study & Needs Assessment.**

Hi, Leanne.

Thank you very much for considering the professional housing planning services of **Hanna:Keelan Associates, P.C.** It would be a professional privilege to work with you and other housing stakeholders in preparing this important **Story County & Communities, Iowa Housing Study & Needs Assessment.**

Hanna:Keelan is in its 42nd year of operation as a full service community planning firm, having completed 1,300 planning projects, including 500+ housing studies and assessments in Cities and Counties in 18 States, including the State of Iowa. We understand the economics of housing and the importance of partnerships in the implementation of important housing programs. The identification and a partial list of housing planning programs completed by the Firm are included in our Proposal.

All **Hanna:Keelan** staff will be involved in the preparation of this Comprehensive Housing Study. Additional information regarding workload, availability and responsibilities are highlighted in this **Proposal.** Our firm will complete the **Story County & Communities, Iowa Housing Study & Needs Assessment** within a time period of 10 months (final cost negotiated with detailed schedule of professional services).

Thank you for considering the community housing planning services of **Hanna:Keelan** and we look forward to hearing from you.

Have a Great Day,



Timothy M. Keelan
Principal Partner & Community Planner

COMPREHENSIVE PLANNING & ZONING • STRATEGIC PLANNING • HOUSING MARKET STUDIES • HOUSING DEVELOPMENT
ECONOMIC DEVELOPMENT RESEARCH & ANALYSIS • PUBLIC FACILITY PLANNING & IMPLEMENTATION
HUMAN RESOURCE PLANNING • STATE & FEDERAL GRANT WRITING & ADMINISTRATION

3275 HOLDREGE STREET • P.O. BOX 30552 • LINCOLN, NE 68503-0552
(402) 464-5383 • FAX (402) 464-5856 • website: www.hannakeelan.com

PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

1. Background: About Hanna:Keelan Associates, P.C.

Hanna:Keelan Associates, P.C. is a Lincoln, Nebraska-based community planning and research consulting firm, founded in 1978 by Becky Hanna and Tim Keelan. The Firm is in its 42nd year of serving Communities, Counties and organizations with community and regional planning and affordable housing programs. **Hanna:Keelan has completed 170+ Comprehensive Plans, 500+ Community and County-Wide Housing Market Studies and 180+ Community Redevelopment Plans.** **Hanna:Keelan’s project experience is highlighted on Pages 2 through 5.**

Hanna:Keelan has conducted the preparation of 65 housing studies for Iowa Counties and Communities, including a 99-County, State-wide “Senior Assisted Living Housing Analysis.”

Philosophy/Planning Approach:

Our Firm utilizes the most effective research methods, both qualitative and quantitative, to develop plans for Counties and Communities across the Midwest that are practical and useable. It has always been the philosophy of Hanna:Keelan to ***work with Counties, Communities and Organizations to achieve a planned consensus that leads to economically and socially feasible implementation activities.*** We are a “planning centric” firm that is routinely recognized as a leader in the preparation of Community and County-Wide Housing Studies, as well as Comprehensive Plans, Zoning and Subdivision Regulations, Downtown Revitalization and Economic Development Strategic Planning. **Hanna:Keelan** personnel comprises 95+ years of professional planning experience in Counties and Communities across the Midwest, including the State of Iowa.

Service capabilities related to your project:

- Housing Market Studies.
- Comprehensive Planning & Zoning.
- Affordable Housing Developments.
- Downtown Housing Developments.
- Downtown & Redevelopment Plans.
- Human Services Planning.
- Organizational Planning.
- Grant Development.
- Needs Assessments for Agencies & Organizations.



Project Manager:

Tim Keelan is an owner and principal partner with Hanna:Keelan and will be the **Project Manager** for the **Story County & Communities, Iowa Housing Study & Needs Assessment.** With 42 years of experience, Tim Keelan is uniquely qualified to lead the completion of this **Housing Study & Needs Assessment.**

PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

2. Professional Qualifications & Work Experience.

Hanna:Keelan has completed Community and County-Wide Housing Studies across the Midwest, each with one common goal: to serve as a “road map” for future development. Our Housing Studies include a wide range of initiatives to be implemented to advance both the development and preservation of affordable housing for all ages and income sectors, which include **Housing Action Plans**, the identification of local, State and Federal funding sources and the creation of partnerships with local and regional housing stakeholders. **The following projects, with references, highlight our commitment to Community and County-Wide housing planning activities.**

The following projects, with references, highlights our broad range of experience with housing planning activities.

Crawford County & Communities, Iowa Housing Market Study.

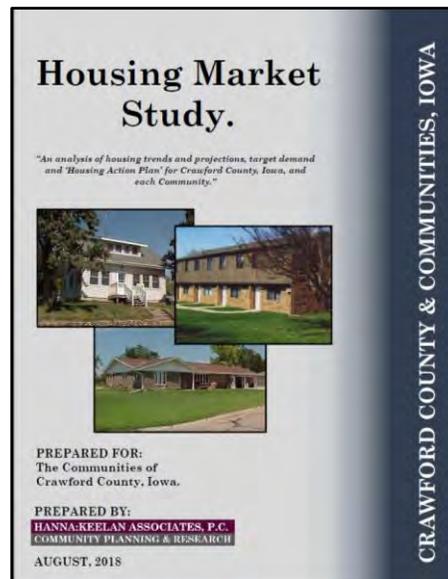
Project Cost: \$24,000.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: August, 2018 (six month time line).

The Crawford County & Communities, Iowa, Housing Market Study was coordinated by the City of Denison, Iowa, and the Crawford County Board of Commissioners. This Housing Study was initiated to assist in the County and each Community in identifying the specific demand for all types of housing, especially in regards to workforce housing to support new major employers locating to the County and retain existing employers. The preparation of a **Five-Year Housing Action Plan** was an important piece of this County-Wide Housing Study, as it will assist with utilizing local, State and Federal funding sources for housing development and redevelopment/rehabilitation projects.

**Contact: Terry Crawford, City Manager
City of Denison, Iowa
Phone # - 712-263-3143
E-mail: citymanager@denisonia.com**



PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

South Omaha Study Area

Housing Demand Assessment – Omaha, Nebraska.

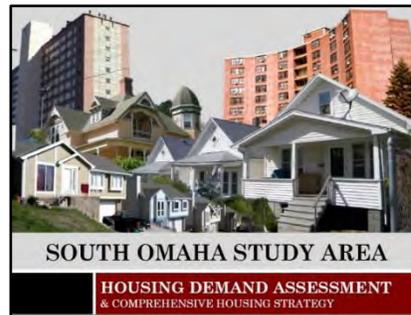
Project Cost: \$44,000.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: August, 2012 (10 month time line).

The South Omaha Study Area Housing Demand Assessment analyzed the existing conditions of some of the oldest residential neighborhoods in the City of Omaha. The Demand Assessment analyzed the overall condition of structures and property and recommended subareas where housing rehabilitation or demolition and replacement were necessary to sustain the future of these older residential neighborhoods. The Assessment also identified vacant lots for infill of new housing types and larger tracts of land for a variety of single and multifamily residential development. Ultimately, the projected demand for new housing, workforce housing and housing for single persons, families, the elderly and special populations of all incomes was projected for the Study Area.

**Contact: Jamie Berglund, Former Senior
Director of Community Development
Greater Omaha Chamber of Commerce
Phone # 402-800-1242
Email: jamie@sparkcdi.org**



**Community Housing Study with Strategies for Affordable Housing –
Grand Island, Nebraska.**

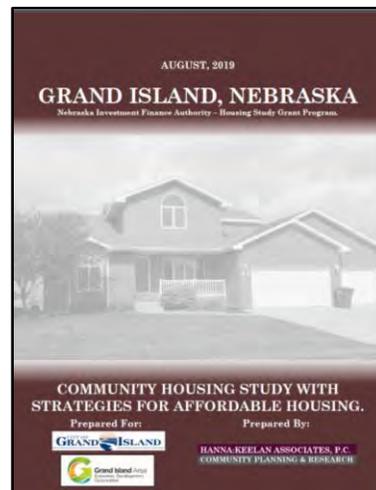
Project Cost: \$38,000.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: August, 2019 (eight month time line).

The Grand Island, Nebraska Community Housing Study was coordinated by the Grand Island Area Economic Development Corporation and Grand Island Community Redevelopment Authority. This Housing Study was initiated to assist in the City in identifying the specific demand for all types of housing, especially the redevelopment of homes in deteriorating neighborhoods. A Five-Year Housing Action Plan was implemented with this Study. An “Analysis of Impediments to Fair Housing Choice” Study was also completed for the City of Grand Island.

**Contact: Mary Berlie, Executive Vice President
Grand Island Area Economic Development Corp.
Phone # 308-381-7500
E-mail: mberlie@grandisland.org**



PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

**Community Housing Study with Strategies for Affordable Housing –
Madison County & Communities, Nebraska.**

Project Cost: \$25,000.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: July, 2019 (eight month time line).

The Madison County & Communities, Nebraska, County-Wide Housing Study was coordinated by the Greater Norfolk Economic Development Foundation. This Housing Study was initiated to assist in the County and each Community in identifying the specific demand for all types of housing, in an effort to support local desires for new housing opportunities. The preparation of a **Five-Year Housing Action Plan** was an important piece of this County-Wide Housing Study, as it will assist with utilizing local, State and Federal funding sources for housing development projects.

**Contact: Jennifer Adams,
Human Resource Specialist
Elkhorn Rural Public Power District
Phone # 402-649-3724
E-mail: jadams@erppd.com**



**County/Communities Comprehensive Housing Study –
Cowley County, Kansas**

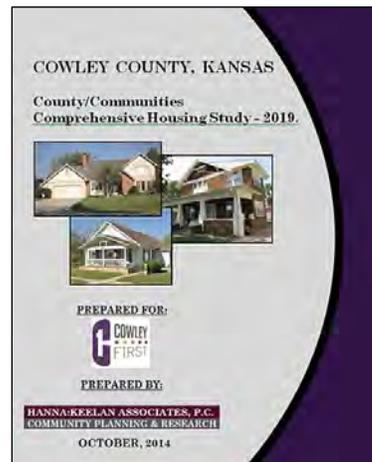
Project Cost: \$19,500.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: October, 2014 (eight month time line).

Cowley First-Cowley County Economic Development Partnership selected Hanna:Keelan Associates to complete a Community Housing Study for Cowley County and each Community. The County was engaged in an extensive Citizen Participation Program, which allowed Hanna:Keelan to develop a series of Housing Goals & Action Steps. An “Action Plan” for future housing development was developed as a means to organize and streamline the development of housing occurring in the County.

**Contact: Keri Falletti, Executive. Director
Cowley First-Cowley County
Economic Development Partnership
Phone # 620-221-9951
E-mail: kfalletti@cowleycounty.org**



PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

Community Housing Study with Strategies for Affordable Housing – Dodge County & Communities, Nebraska.

Project Cost: \$32,000.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: October, 2014 (six month time line).

The Dodge County, Nebraska, County-Wide Housing Study was coordinated by the Greater Fremont Development Council, on behalf of several public and private/non-profit organizations. This Housing Study was initiated to assist in the County and each Community in identifying the specific demand for all types of housing, especially in regards to workforce housing to support major employers locating to the County. The preparation of a **Five-Year Housing Action Plan** was an important piece of this County-Wide Housing Study, as it will assist with utilizing local, State and Federal funding sources for housing development projects.



**Contact: Garry Clark, Exec. Director,
Greater Fremont Development Council.
Phone # - 402-753-8126
E-mail: garry.clark@fremontecodev.org**

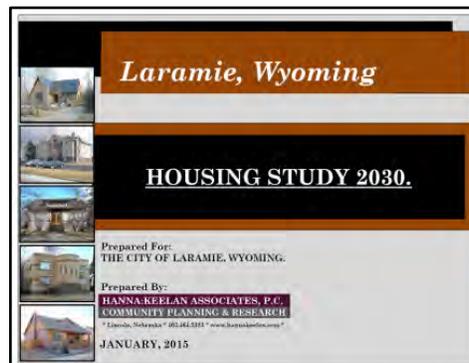
Laramie, Wyoming Housing Study.

Project Cost: \$52,000.

Percentage of Work Completed by Hanna:Keelan: 100%.

Completion Date: January, 2015 (eight month time line).

The City of Laramie hired **Hanna:Keelan Associates** to develop a Housing Study aimed at identifying housing needs through the year 2030. The Study included a series of “Housing Goals & Action Steps” and a Five-Year “Housing Action Plan” to identify specific development activities and housing partnerships/ funding sources to aid in housing development, redevelopment and rehabilitation. The Study also highlighted housing demands for specific population groups, including the elderly, workforce, student and special needs populations.



**Contact: City of Laramie, Wyoming-Planning Division
Phone # - 307-721-5207**

PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

Other Pertinent, Recent Housing Study Programs completed by Hanna:Keelan:

- Fremont, Nebraska Analysis of Impediments to Fair Housing Choice.
- Norfolk, Nebraska Analysis of Impediments to Fair Housing Choice.
- Southwest North Dakota Housing Demand Analysis.
(Adams, Billings, Dunn, Golden Valley Hettinger, Slope & Stark Counties).
- Ames, Iowa Analysis of Impediments to Fair Housing Choice.
- Scotts Bluff, Morrill & Kimball County & Communities, Nebraska
Multi-County Regional Housing Study with Strategies for Affordable Housing.
- Hastings, Nebraska Community Housing Study.
- Gage County & Communities, Nebraska County-Wide Housing Study.
- Seward County & Communities, Nebraska County-Wide Housing Study.
- Burt County & Communities, Nebraska County-Wide Housing Study.
- Keith County & Communities, Nebraska County-Wide Housing Study.
- Dawson County Area, Nebraska Area-Wide Housing Study.
- Norfolk, Nebraska Community Housing Study.
- Tecumseh, Nebraska Planning Program.
(Community Housing Study, Comprehensive Plan & Zoning Regulations).
- Pender, Nebraska Planning Program.
(Community Housing Study, Comprehensive Plan & Zoning Regulations).
- Crete, Nebraska Planning Program.
(Community Housing Study, Comprehensive Plan & Zoning Regulations).
- Wayne, Nebraska Planning Program.
(Community Housing Study, Comprehensive Plan & Zoning Regulations).

3. Hanna:Keelan Professional Staff.

Becky J. Hanna

Co-founder of **Hanna:Keelan Associates**, Becky has extensive experience with a variety of planning development projects, as well as a Development Consultant for 170+ Affordable Housing Projects throughout the United States representing major National Non-Profit Organizations, to obtain funding and to supervise the construction and implementation of affordable housing for families, the elderly and for persons with disabilities. Becky was the 2009 recipient of the Distinguished Alumni Award, College of Architecture, University of Nebraska-Lincoln.



Education:

- **Masters of Community & Regional Planning**
 - University of Nebraska – Lincoln; 1978.
- **Bachelor of Science**
 - Nebraska Wesleyan University- Lincoln; 1975.

Timothy M. Keelan

Co-founder of **Hanna:Keelan Associates**, Tim has extensive experience with a variety of planning development projects, including Downtown and Redevelopment Planning, Comprehensive Plans, Housing Market Studies, and Affordable Housing Programs, for families, elderly households and special populations. Tim was the 2000 recipient of the Distinguished Alumni Award, College of Architecture, University of Nebraska-Lincoln.



Education:

- **Masters of Community & Regional Planning**
 - University of Nebraska – Lincoln; 1978.
- **Bachelor of Arts, specialization, Urban Geography**
 - University of Nebraska- Lincoln; 1975

Keith R. Carl

Keith has gained experience in a wide variety of Planning Projects throughout his 11 years with **Hanna:Keelan Associates**. His knowledge of background/demographic research, trend analysis & projections, survey implementation, citizen participation and comprehensive planning processes has developed by being involved in a wide range of planning projects.



Education:

- **Bachelor of Science, Community and Regional Planning**
 - Iowa State University, Ames, Iowa; 2007.

Jacob (Jake) A. Palm

Jake joined the **Hanna:Keelan** staff in May, 2018. He has been active in collecting statistical information from data sources and surveys from various local and State resources and citizen participation processes.



Education:

- **Bachelor of Science, Business Administration**
 - University of Nebraska-Lincoln, 2017.
- **Master of Community & Regional Planning (Graduation Date: December, 2019)**
 - University of Nebraska-Lincoln.

4. Capacity of the Firm to Perform the Work.

Throughout the past 42 years of working with Communities and Counties in and across the Midwest, **Hanna:Keelan Associates** has gained a unique knowledge of scheduling projects and completing them on time and within budget. Our Firm has recently completed several planning projects which allows us to accept new projects, such as the **Story County & Communities, Iowa Housing Study & Needs Assessment**.

Hanna:Keelan Associates maintains an annual work load that that keeps our staff focused on completing projects on time and within budget. Our focus on client service and proven ability to manage workloads has allowed our firm to consistently maintain our level of staff. We are currently completing several projects and have the availability to effectively implement the **Housing Study & Needs Assessment** process.

5. Understanding of the Project.

Hanna:Keelan has in-depth knowledge regarding the assessment of current and future housing trends experienced by Counties and Communities throughout the region. The Firm has extensive experience researching and analyzing the key elements identified in the Request for Proposal (RFP) for this **Housing Study & Needs Assessment**. This includes a public participation process utilizing voluntary Surveys for the general public, as well as the local workforce and major employers, profiling the current and projected demographic, housing, income and economic data, defining housing affordability for various income sectors. The **Housing Study** process will conclude with a County-Wide Housing Summit, featuring a presentation to selected, invited housing developers, providers, funders, from Story County and the State of Iowa.

With several planning documents having already been completed, it will be imperative for Story County to organize all active and potential housing and community development partnerships to see that the recommendations made in recent documentation is carried out. This proposed **Housing Study & Needs Assessment** will document all necessary initiatives, via *qualitative* and *quantitative* research processes, and assign one or multiple housing and/or community development partners to carry out a specific task. **Hanna:Keelan** has prepared “**Housing Action Plans**” for **Cities, Counties and Regions of all sizes and backgrounds**.

6. Methodology Approach/Restatement of Services.

1. Population and Demographic Review and Projections.

Hanna:Keelan will conduct preliminary and final research activities from a variety of information sources including, but not limited to the U.S. Census, American Community Survey, Iowa Economic Development Authority and the Comprehensive Housing Affordability Strategy vis the U.S. Department of Housing and Urban Development. Information from these and other data sources will allow for our Firm to properly analyze the true housing market and development needs of Story County and make a better than reasonable conclusion regarding the current state of the County's residents and associated housing stock. Projections will include a time frame up to 2040. A voluntary, county-Wide "Housing Survey" for all residents of Story County will allow Hanna:Keelan to document public opinion as it relates to housing condition and need

2. Housing Market Analysis.

Understanding the current availability of housing that serves both the basic and complex needs of local residents is critical to preparing a successful and well-utilized Housing Study. Interviews with local housing professionals and providers, as well as the collection of data from local, State and Federal services will help Hanna:Keelan obtain knowledge regarding the appetite of local developers, funders and contractors in their desires to develop specific housing types in Story County. Local government resources, such as County GIS, Assessor, Treasurer and Planning & Zoning departments may be contacted to assist with gathering local housing information.

3. Housing Demand and Vacancy Rates.

A healthy vacancy rate of both owner and rental housing is key for communities and counties of all sizes to attract new and retain existing families and provide "choice" for those actively searching for a suitable living situation. An analysis of "Housing Target Demand" for Story County and each community, as well as the unincorporated areas of Story County, will appropriately determine the amount of housing needed via a scenario of alleviating all or some of the most widely-experienced housing issues (cost burden, overcrowding, vacancy deficiency, substandard/dilapidated conditions, etc.). A breakout into housing for various "income sectors" and "price points" (based on average affordable monthly rent and purchase price per income sector) will be key to specifically identifying the target housing needs of Story County.

PROPOSAL:

Story County & Communities, Iowa Housing Study & Needs Assessment.

4. Existing Housing Conditions and Issue Areas.

On-site field work analysis will be key to understanding development patterns in the communities and rural areas of Story County. Additionally, the identification of suitable land for new housing development, as well as “target areas” for housing rehabilitation and/or demolition and replacement will allow communities and unincorporated areas of Story County to properly plan for how and where to focus local, State and Federal monies for housing activities. A review of local land use and zoning/subdivision policies will further allow for the identification of local regulations that impede and reduce potential housing development activity.

5. Economic profiles and Projections.

Story County possesses diverse economic opportunities for both small business and major employers, both commercially and industrially. Utilizing data from local economic development corporations and major employers, as well as the Iowa Economic Development Authority, U.S. Census Center for Economic Studies, Bureau of Labor Statistics, Bureau of Economic Analysis, etc. This will give Hanna:Keelan insight to the current economic climate of Story County, including historic and current labor force, employment trends, commuting patterns of local employees and the identification of major “employment centers” in Story County. Additionally, a Workforce Housing Needs Survey will identify the current housing situation and housing needs and wants of the County’s workforce.

6. Gap Analysis.

Determining shortages and surpluses of specific housing types is critical to creating a holistic and robust housing market in Story County. Information provided by local specialized housing service providers, funding institutions and local governments will help identify specific housing needs of the communities and unincorporated areas of Story County. Knowledge of both recent and proposed housing development and rehabilitation projects, including proposed rents/purchase prices, estimated rehabilitation costs and documentation of available funding resources will help our Firm to better understand the true housing needs of Story County.

7. Barriers Analysis.

Documentation of impediments and barriers to obtaining affordable, suitable housing will be analyzed through the organized distribution of a county-wide “Housing Survey.” Contacts with local Housing Authorities and specialized housing providers will help to determine the specific issues of persons and families of all incomes searching for housing in the County.

8. Recommendations.

All collected data and research will be utilized in the preparation of very specific “Housing Goals, Action Steps and Planning Initiatives” and a “Housing Action Plan” that will be the most important component of the **Story County & Communities, Iowa Housing Study & Needs Assessment.** The identification of local and State housing partnerships (both development and funding-related) and the implementation of recommended housing development, rehabilitation and preservation projects will serve as a road map for Story County and each community as they strive to create a housing market that satisfies the needs of persons and families of all incomes, improves the local tax base and strengthens the quality of life in the county.



7. Scope of Work.

The following Page highlights the proposed **Scope of Work, Time Line** that **Hanna:Keelan** will employ throughout the **Story County & Communities, Iowa Housing Study & Needs Assessment** program. A not-to-exceed “Total project Cost” is also provided and includes costs that both include and exclude the City of Ames.

Hanna:Keelan proposes to complete the **Story County Municipalities Community Housing Study** within 10 months of the official start date. Our Firm will begin field work and research activities on **January 29, 2020**, as requested in the RFP. Billing will be based on 25, 50, 75 and 100 percent completion of identified work activities. The Firm will not experience any conflicts of interest during the preparation of the **Story County & Communities, Iowa Housing Study & Needs Assessment**.

SCOPE OF WORK, TIME LINE & COST. Story County & Communities, Iowa Housing Study & Needs Assessment.	Month #1	Month #2	Month #3	Month #4	Month #5	Month #6	Month #7	Month #8	Month #9	Month #10
Citizen Participation Process.										
County-Wide Housing Steering Committee.										
*County-Wide Housing Surveys: Resident, Major Employer/Workforce.										
County-Wide Housing Summit (Selected Communities).										
*Housing Study Progress Link/Educational Web Site.										
*Social Media via Facebook, Constant Contact, etc..										
1. Population and Demographic Review and Projections (2040).										
Completion of all components identified under Item #1 of Story County RFP.										
2. Housing Market Analysis.										
Completion of all components identified under Item #2 of Story County RFP.										
3. Housing Demand and Vacancy Rates.										
Completion of all components identified under Item #3 of Story County RFP.										
4. Existing Housing Conditions and Issue Areas.										
Completion of all components identified under Item #4 of Story County RFP.										
5. Economic Profiles and Projections.										
Completion of all components identified under Item #5 of Story County RFP.										
6. Housing Gap Analysis.										
Completion of all components identified under Item #6 of Story County RFP.										
7. Housing barriers Analysis.										
Completion of all components identified under Item #7 of Story County RFP.										
8. Recommendations.										
Completion of all components identified under Item #8 of Story County RFP.										
Completion of Story County & Communities, Iowa Housing Study & Needs Assessment.										
TOTAL PROJECT COST	\$43,000									
TOTAL PROJECT COST (INCLUDING CITY OF AMES)	\$55,000									



Housing Study & Needs Assessment

Story County, Iowa

submitted by: RDG Planning & Design | 1302 Howard Street | Omaha, Nebraska 68102 | 402.392.0133



December 13, 2019

Story County Auditor's Office
c/o County Outreach & Special Programs Manager
Story County Administration
900 6th Street
Nevada, Iowa 50201

RE: Request for Proposals for Story County Housing Study & Needs Assessment

Dear Selection Committee,

RDG is pleased to submit the following proposal for the Story County Housing Study. We strongly believe that our skill sets and experience in completing housing studies across the Midwest will be of great value to you. We are fortunate to have worked on the previous Story County Housing Study and proud of the national housing practice that we have built since. This work has included multi-county housing studies in Indiana and Missouri; cities and counties with large university populations such as Lincoln, NE, Bloomington, IN, and Fayetteville, AR; and the state-wide IFA Housing Study.

We believe that as a multidisciplinary firm, we bring a broader understanding of how housing fits into the larger economy of a community and region. As regional leaders in comprehensive planning, downtown planning, and the growing field of community health, we understand the importance of how housing choice, affordability, and quality are closely tied to land use, transportation, and urban design policies and programs. Our knowledge in these areas, along with our experience as implementers, will bring interesting perspectives to the opportunities and challenges facing Story County.

Addressing affordable and workforce housing issues is a growing concern in the Midwest. Traditional tactics continue to have a role, but new strategies must be identified to address the changing economic forces. More regions are realizing they must work together to address housing needs. Therefore, we are especially excited to see Story County take the lead on this initiative. We have recently completed a similar process with Regional Opportunity Initiatives in Southern Indiana, assessing housing opportunities in an 11-county area. Identifying local, county, and regional level strategies has been essential to that process, and we see the same type of energy and organizational capital existing in Story County. We are also currently working on the Ames Comprehensive Plan, which has provided our team with a deep understanding of the housing opportunities and issues facing the county's largest city. Our core team members will bring a mix of perspectives to the county. Charlie Cowell has worked extensively on the Ames Plan. Amy Haase assisted with the housing analysis in Ames and has worked with other regional counties, including Hamilton, and will bring her national perspective to this project. We are excited about working with you to identify solutions that address the full range of housing needs within Story County.

Our work is mission-driven, based on a commitment to improve the quality and viability of communities. We believe that no one will work harder or with greater commitment to the good of the region. Furthermore, our range of experiences and capabilities in planning, economic development, and technical design are well-matched to the tasks at hand. We are excited about the prospect of working with you, and we believe our team is superbly equipped to take on these important challenges with you.

Sincerely,
RDG Planning & Design



Amy Haase, AICP
Principal



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CONTACT:

Amy Haase, AICP
 Principal-in-Charge

OFFICE LOCATION:

900 Farnam Street
 Suite 100
 Omaha, Nebraska 68102
 402.392.0133
 www.rdgusa.com



RDG Planning & Design is a network of design and planning professionals, dedicated to applying our talents in extraordinary ways. **We're architects, landscape architects, engineers, artists, and planners** with a passion for design, and a drive to make a difference. Beyond creating a vibrant community, we want you to enjoy the process of getting there. With offices in Omaha (NE); St. Louis, and Des Moines (IA), RDG Planning & Design is employee-owned. More than 60% of our employees own stock in the company.

From our newest staff to the founding fathers that began their practices in the 1960's; RDG Planning & Design is dedicated to the collaborative planning process. Officially formed in 1989 as the Renaissance Design Group and crafted to bring well established firms together into practice, our organization provides the right people for integrated solutions. Areas of specialization, include: Community and Regional Planning, Historic Restoration, Public Art, Parks and Recreation, Government and Public Safety, Transportation Enhancements, Urban Design, Athletic Fields and Complexes, Corporate, Healthcare, Higher Education, K-12 Education, Senior Living and Worship Facilities.

RDG's Community and Regional Planning group provides a wide variety of design and planning services. With a growing national practice, RDG is a regional leader in urban design, downtown and housing market analysis and housing strategies, comprehensive planning, and enhancement of transportation corridors. Since our formation in 1989, we have worked in more than 300 large and small communities throughout the Midwest, and have completed housing market studies for cities from Colorado to Indiana.

We believe in applying new ways of thinking and innovative approaches to the preparation of plans that address community and regional issues. At the same time, plan recommendations must be based upon a realistic assessment of the practicality of implementation. The resultant product, as evidenced by our numerous successful planning efforts and awards, is an innovative plan with an emphasis upon implementation.

Recognized Projects:

- 2018 National APA Daniel Burnham Award; plan**okc**
- 2017 Nebraska APA Implementation Award; Plattsmouth Downtown Revitalization
- 2016 Iowa APA Implementation Award; Marshalltown City Center Plan
- 2015 Iowa APA for Daniel Burnham Award; EnvisionCR
- 2014 Iowa APA for Transportation; Activate Mason City Bicycle and Pedestrian Plan
- 2013 Iowa APA for Daniel Burnham Award; Tomorrow Plan for Des Moines Metropolitan Area
- 2012 Iowa APA for Urban Design; Federal Avenue Plaza Mason City

179 EMPLOYEES | **69** LICENSED PROFESSIONALS | **34** OF STAFF LEED APS | **66%** OF STAFF ARE STOCKHOLDERS



Amy A. Haase, AICP



PROJECT MANAGER

Since joining RDG in 1999, Amy has managed numerous projects including comprehensive plans, housing market studies, downtown and corridor redevelopment, neighborhood revitalization, park master plans, and transportation studies. Amy is a trusted leader in developing plans and leading public engagement processes that fit the needs of communities of all sizes throughout the Midwest.

EDUCATION:

1999
 University of Nebraska-Omaha,
 Masters of Science, Urban
 Studies

1995
 Wayne State College,
 Bachelor of Arts, Social
 Science Field Endorsement

REGISTRATIONS:

American Institute of
 Certified Planners, 2003
 Certified Public Facilitator,
 International Association of
 Public Participation (IAP2)

Housing Market Studies

One of Amy's specialties is project management on housing market studies. She's served as a leader in numerous studies throughout the region:

- Nebraska:** York County, Nebraska City, Norfolk, Plattsmouth, Schuyler, South Sioux City, Wayne, Keya Paha, Brown, and Rock Counties
- Minnesota:** Ada, Appleton, Bemidji, Cannon Falls, Lake City, Mabel-Canton-Spring Grove, Plainview, Proctor, Roseau, Wadena, Wells, Zumbrota, Becker, Pine, Dodge, and Clearwater Counties
- Kansas:** Caldwell, DeSoto, Dodge City, Garden City, Great Bend, Hays, Lawrence, Leoti, Liberal, Russell, Ford, Finney, and Dickinson Counties
- Indiana:** Indiana Uplands Regional Housing Study (Dubois, Lawrence, Monroe, Daviess, Owen, Martin, Orange, Brown, Crawford, Greene, & Washington counties)
- Iowa:** Bellevue, Estherville, Forest City, Manquoketa, Newton, Onawa, Spirit Lake, Story City
- Colorado:** Woodland Park, Crowley County
- Missouri:** Lake of the Ozarks Regional Study, Laclede County, Belton, Blue Springs, Clinton, Concordia, Knob Noster, Lee's Summit, Lexington, Liberty, Maryville, Raytown, Rolla, Saint Joseph, Sedalia, Trenton, Taney County (Branson), Warrensburg
- Michigan:** Bedford Township, Ferrysburg, Grand Haven, Spring Lake, Hillsdale, Saint Joseph Counties

Land Use and Comprehensive Planning

<i>Nebraska</i>	Seward	<i>Iowa</i>	<i>Missouri</i>	<i>South Dakota</i>
Beatrice	Superior	Grimes	Excelsior Springs	Sturgis
Norfolk	Wayne	Pella	Maryville	Yankton
Papillion	Waverly		Camdenton	
Plattsmouth	Valentine	<i>Kansas</i>	<i>North Dakota</i>	<i>Texas</i>
Ravenna	Douglas, Sarpy &	Hays	Bismarck	Kermit
Schuyler	Cuming Counties	Ellis County		Midland
		Junction City	<i>Oklahoma</i>	
		Geary County	Oklahoma City	
			Shawnee	

CONTACT:

Amy Haase, AICP
 402.392.0133
 ahaase@rdgusa.com



project approach & understanding



The following section provides an overview of the approach based on Story County's Request for Proposals and our experience completing housing studies for 30 years in communities from North Dakota to Texas and Wyoming to Indiana. However, this is only a starting point in a partnership we look to develop with Story County. A detailed scope can be adjusted according to the priorities of staff and the Steering Committee. The three-part planning process focuses on three key components:

- Assessing conditions and goals
- Identifying gaps and establishing a strategic agenda
- Defining the strategies and actions to move forward

Project Management

For this housing study to be successful, effective project management is essential.



A. Project kick-off meeting and tour. A kick-off meeting will be held involving RDG and Story County staff. The purpose of this meeting is to discuss project scope and schedule, clarify expectations, and answer any questions. RDG would like to tour the county with staff to hear directly about projects, potential areas of focus, and important issues at the onset of the planning process.

B. Technical Committee. RDG will meet monthly with the Technical Committee to review progress, findings, and recommendations. The committee should consist of representatives from each city or at least the ten largest cities (excluding Ames).

C. Project management meetings. The RDG team will schedule biweekly meetings with the county's management team. These meetings help ensure everyone stays on track with the scope, schedule, and budget. The meetings will allow the team to plan upcoming events, ensure data collection, and review output from meetings and content development. These meetings will occur by telephone or video conference.



Citizen Participation/Stakeholder Outreach

Our team strongly believes in a community engagement process that supplements the data collection and market analysis. We have worked with smaller counties such as Hamilton County, to large regions like the Indiana Uplands (11 counties). In all our planning processes, we use a variety of techniques, ranging from community events to a multi-dimensional online presence using social media and an interactive website. The RDG staff includes public involvement specialists who understand a community engagement process must both educate our team on the county's issues and priorities and help residents understand the role different partners must play to create a strong housing market.



A. Listening Sessions. We have found the best way to fully understand each city is to talk with the people who know it best. RDG proposes a series of targeted listening sessions to be conducted at the beginning of the process within several communities. We would propose holding three to four days of discussions in communities around the county, meeting with four to six groups per day.

B. Market Surveys. There are many questions Census numbers and other data sources cannot answer that can best be understood through surveys of residents and employees. We would propose two surveys be conducted:



project approach & understanding

1. **County-Wide Market Survey.** We would propose a general market survey built upon our understanding of similar markets and items identified in the RFP. The survey will be designed for email distribution with paper versions provided where appropriate. This survey will be broad in nature, gathering information on the current market, local/regional financing, and support for potential policy directions. At the kick-off meeting, residents and work zip codes will be tracked, and targets for each community will be established.
2. **Workforce Housing Survey.** This is a short survey that can be distributed to the county's largest employers. This can be done online, but paper copies should also be available in break rooms. The survey focuses on employees' desired living location, what they currently pay, their current income to assess what they can afford, and - if they are over 55 - the type of housing they would like in retirement.

We have also developed other housing survey tools similar to those identified in the RFP. These have included rental and special needs surveys. To provide a fuller understanding of rental or specialty housing providers (assisted living and independent senior living), RDG has developed more targeted surveys. For these surveys, questions include number of units, rental rates, vacancy rates, types of support services provided for senior-oriented facilities, and general comments on the market.

- C. **Online Communication.** While aspects of a housing study can be very technical in nature, online tools can be very beneficial. The biggest role an online presence can have is driving up survey responses. If needed, RDG will provide content for social media and websites and coordinate with local news outlets.
- D. **Civic Organizations.** Often, it can be difficult to reach all stakeholders through the listening sessions. To broaden the engagement of community stakeholders, we would recommend assembling a packet of material including plan information and comment cards for collecting input.
- E. **Stakeholder Presentation.** Following the completion of a draft plan and review by the technical committee, RDG will present study results to stakeholders. These presentations would be open to participants in the stakeholder groups, city and county officials, and other interested members of the public. This would be ahead of and separate from presentations to the County Board.

County responsibilities:

- » Identify Technical Committee members
- » Assist RDG with distribution of surveys
- » Guide RDG team on the field tour
- » Organize logistics for listening sessions
- » Identify stakeholder participants and invite them to the applicable session
- » For best results, follow up calls and/or e-mails reminders to listening session invitees the day before the sessions
- » Organize logistics for presentation to stakeholders

Discovery and Analysis

RDG will begin with a review of previously completed studies for communities in the county, as well as existing state and local ordinances and policies. This work will be reviewed with committee members to validate and identify gaps. For additional examination of the market, we will use several different data sources, including:

- American Community Survey and 2010 Census data
- ERSI Community Analysis
- Local building permit data provided by the cities
- County Assessor and community development data
- MLS reports for the past three to five years



project approach & understanding

DEMOGRAPHIC AND ECONOMIC ATLAS

We are especially intrigued by the idea of looking at each city's data through a series of atlases. Understanding where development has been occurring, what that development looks like, and how that matches the demographic and economics of the cities and region will help to define specific policies and strategies as the cities move forward. This analysis will include data points identified in the RFP and other pertinent topics that arise from community engagement.

MARKET ASSESSMENT

Following the review of demographic data and discussions with stakeholders, we will use or our own projection modeling to complete housing and economic inventories and forecasts. In addition to the items identified in the RFP, the market assessment may consider:

- Land demand by density classification and potentially by site analysis
- Special-population demands, including senior housing demand by price and occupancy
- Employment composition and change within the market area, identifying factors that could influence demand generated by predictable population change
- Existing organizational structures in the cities relative to provisions for housing services
- The regulatory environment related to housing construction and affordable housing, including zoning and subdivision regulations

County responsibilities: Assistance with gathering local information such as building permit data, assessor data, zoning ordinances, economic development data related to job growth and demand, and multiple listing service (MLS) or other sales information for the last three to five years, if available.

Opportunities Map

During this step, RDG will complete an on-site field review of housing in each of the participating communities. This effort will provide the data identified in the RFP related to existing conditions and the basis for identifying potential development and redevelopment areas in each city. Findings will be combined with citizen feedback gathered in Task I to create an opportunities map for each community.

Deliverables: Housing conditions data and opportunity map for each city.

County responsibilities: Review maps.

County Housing Needs Assessment

The items in the RFP are a comprehensive list of issues and opportunities that should be addressed in any housing study. We see this list evolving as we listen to stakeholders and assess the market. What we learn from these sources should guide the recommendations of the plan. Traditionally, our strategies address:

- Gaps in the market
- Organizational and housing delivery systems
- Program approaches
- Strategies for affordable housing
- Project financing and proformas
- Rehabilitation and neighborhood development
- Regulatory approaches and strategies
- Supporting services and other issues

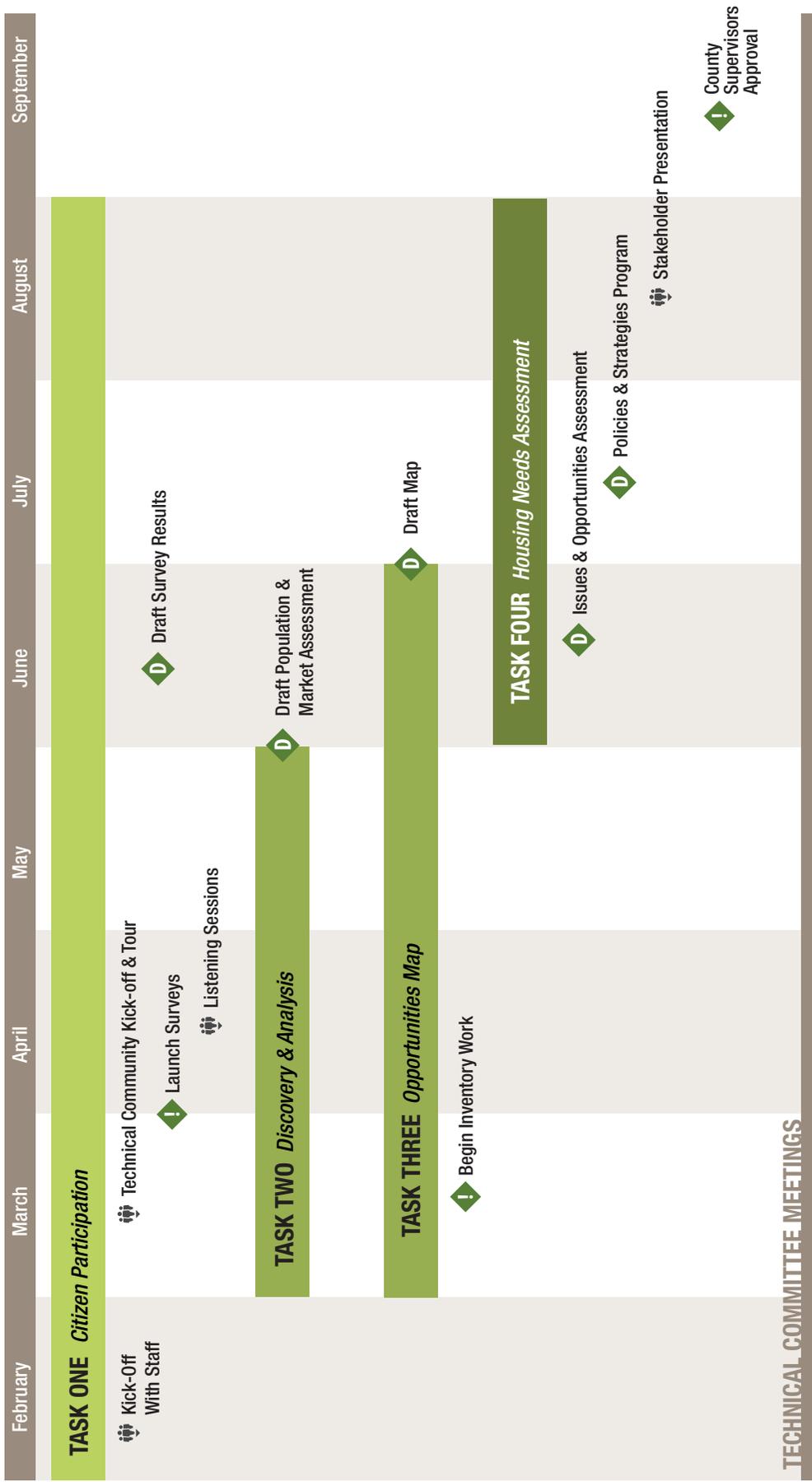
Additionally, any strategies or policies recommended in previous studies will be reviewed and assessed for their effectiveness. This assessment will be done in a workshop format with the technical committee.

County responsibilities: Review material and coordinate presentation of the study to county supervisors.



SCHEDULE
STORY COUNTY HOUSING STUDY & NEEDS ASSESSMENT

Land Use Workshop



Charlie Cowell, AICP



ASSISTANT PROJECT MANAGER

Charlie has experience across many fields of urban planning and implementation including historic preservation, code writing, and active transportation. As a former Planner with the City of Sioux City, he worked one-on-one with developers on site plan proposals, downtown greenspace improvements, code reviews, and drafting recommendations to local officials. Charlie's experience assisting developers and implementing plans translates into his success as a consultant creating realistic and sustainable recommendations for communities of all sizes.

EDUCATION:

2013
University of Iowa, Master of Science Urban and Regional Planning

2011
University of Northern Iowa
Bachelor of Arts, Economics

REGISTRATIONS:

American Institute of Certified Planners, 2016

AFFILIATIONS:

Member - American Planning Association, National and Iowa Chapter

Board Member, Awards Coordinator - Iowa Chapter of the American Planning Association

Housing Market Studies

- Mitchell County Housing Study - *Mitchell County, IA*
- Tri-County Housing Assessment - *Calhoun, Hamilton, and Pocahontas County, IA*
- Muscatine Housing Demand Study - *Muscatine, IA*

Land Use and Comprehensive Planning

- Grimes Comprehensive Plan Update - *Grimes, IA*
- Kalona Comprehensive Plan Update - *Kalona, IA*
- Plan Dyersville: Comprehensive Plan - *Dyersville, IA*
- Seward Comprehensive Plan - *Seward, NE*
- Detroit Lakes Comprehensive Plan Update - *Detroit Lakes, MN*

Development Ordinance and Guidelines

Charlie provides ordinance review on all planning projects and specializes in ordinance drafting and development. More robust projects include:

- Grand Forks Downtown Form Based Code - *Grand Forks, ND (In progress)*
- Dyersville Zoning Ordinance Rewrite - *Dyersville, IA (in progress)*
- Bettendorf Zoning Rewrite - *Bettendorf, IA*
- Pella Planning Services - *Pella, IA*
- Highway 141 Overlay Design Manual - *Grimes, IA*
- The Neighborhood at Indian Creek Design Standards - *Marion, IA*
- Camdenton Zoning Updates - *Camdenton, MO*
- Seward Zoning Updates - *Seward, NE*

Special District & Downtown Plans

- Pella Downtown Streetscape - *Pella, IA*
- Academy Arts District Plan - *Maize, KS*
- Dyersville Downtown Plan - *Dyersville, IA*
- Mandan Downtown Plan - *Mandan, ND*
- MidTown Tosa Plan - *Wauwatosa, WI*
- Waupaca Downtown Plan - *Waupaca, WI*
- West Lake Drive Corridor Plan - *Detroit Lakes, MN*

Development Application Assistance - *Various*

Historic Preservation Commission Liaison* - *Sioux City, IA*

Code Development, Enforcement, and Site Plan Review* - *Sioux City, IA*

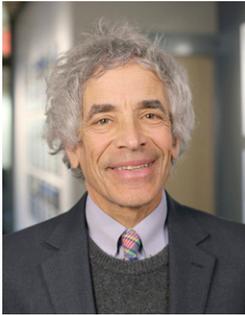
*Indicates work completed while employed elsewhere

CONTACT:

Charlie Cowell, AICP
515.288.3141
ccowell@rdgusa.com



Martin H. Shukert, FAICP



REDEVELOPMENT SPECIALIST

Martin is a city planner/urban designer with over 40 years of experience. He served as Omaha's Planning and Community Development Director in the 1980s, leading major downtown/neighborhood reinvestment programs, writing comprehensive plan elements, developing/implementing the city's zoning ordinance, and beginning the process of trail development. Since 1989, he has continued his commitment to planning excellence and innovation in a variety of areas including transportation, transit and trails; downtown; housing; large scale land use; redevelopment planning and implementation; corridor design; wayfinding; and more.

EDUCATION:

1974
 University of California-Berkeley,
 Masters of Architecture

1971
 Yale University,
 Bachelor in Division IV
 Studies (City Planning)

Magna Cum Laude

REGISTRATIONS:

2004
 Fellow of the American
 Institute of Certified Planners

1984
 American Institute of
 Certified Planners

PAST EXPERIENCE:

Planning and Community
 Development Director
 City of Omaha, NE

RECOGNITION:

2010
 Induction into the Nebraska
 Housing Hall of Fame

Innovative Housing Planning Programs

- Ames/Story County, IA
- Columbus, NE
- Gering, NE
- Hall County Housing Authority - NE
- Iowa Falls, IA
- Marshalltown, IA
- Siouxland Metropolitan Area
- Scottsbluff, NE
- State of Iowa Housing Study
- Webster City, IA
- Over 100 community housing studies

Land Use and Comprehensive Planning

<i>Iowa</i>	Mount Vernon	<i>Missouri</i>	Norfolk	<i>Oklahoma</i>
Altoona	Oskaloosa	Excelsior Springs	Papillion	planOKC
Ankeny	Ottumwa	<i>Nebraska</i>	Plattsmouth	Oklahoma City
Bettendorf	Pella	Beatrice	Ralston	<i>Texas</i>
Cedar Rapids	<i>Kansas</i>	Columbus	Wayne	Midland
Clear Lake	Hays	Chadron	<i>North Dakota</i>	
Denison	Junction City	Fremont	Dickinson	<i>Wyoming</i>
Mason City		Kearney	Jamestown	Gillette

Neighborhood Redevelopment Plans

- East Tosa Neighborhood Plan - Wauwatosa, WI
- North Omaha Development Plan - Omaha, NE
- Park Avenue Redevelopment Plan - Omaha, NE*
- South Omaha Business District - Omaha, NE*
- 6th Avenue District - Des Moines, IA
- East Grand District - Des Moines, IA
- Northside Neighborhood - North Platte, NE
- Live Salina - Salina, KS

Urban Design, Town Center, and Corridor Plans

<i>Nebraska</i>	Scottsbluff-Gering	<i>Illinois</i>	<i>Minnesota</i>	<i>Wisconsin</i>
Alliance	South Omaha	Macomb	Bemidji	De Pere
Fremont		Mount Vernon	Detroit Lakes	Wauwatosa
Grand Island	<i>Iowa</i>		Park Rapids	Waupaca
Hastings	Burlington	<i>Kansas</i>		<i>Wyoming</i>
Lincoln	Clear Lake	De Soto	<i>Missouri</i>	Buffalo
Kearney	Council Bluffs*	Fort Scott	Excelsior Springs	Gillette
Nebraska City*	Marshalltown*	Hays	Saint Louis	Rawlins
Omaha*	Mason City*	Olathe	Trenton	
Ralston	Oskaloosa	Shawnee	<i>South Dakota</i>	
Papillion	Pella	Topeka	Deadwood	
	Perry		Rapid City	
	Shenandoah*			

*Indicates awards

CONTACT:

Marty Shukert, FAICP
 402.392.0133
 mshukert@rdgusa.com





GIS SPECIALIST

Brett Kelly joined the firm in 2018 and has been involved in a range of community and regional planning projects. He utilizes geographic information systems software and performs spatial analysis to provide clients solutions for their unique needs. Brett has created and curated geographic data on regional housing assessments, comprehensive city plans, active transportation studies, and neighborhood developments. His responsibilities include gathering and creating existing site conditions data, utilizing GIS analysis to better understand a community, and creating sharp, easy to read cartographic products for the client.

EDUCATION:

2014
University of Nebraska -
Lincoln, Bachelor of Science
in Environmental Studies

2018
University of Nebraska-Omaha,
Masters of Arts in Geography

2018
University of Nebraska-Omaha,
Graduate Certificate, Geographic
Information Science

Housing Studies

- Indiana Uplands Regional Housing Strategy - *IN*
- Calhoun County Housing Needs Assessment - *IA*
- Pocahontas County Housing Needs Assessment - *IA*
- Lincoln Community Action Plan - *Lincoln, NE*
- Hamilton County Housing Needs Assessment - *IA*
- McPherson Kansas Housing Plan - *McPherson, KS*
- Seward Blight Study - *Seward, NE*
- Taney County Comprehensive Housing Study & Needs Analysis - *Branson, MO*
- Washington County Housing Study - *Washington, IA*

Land Use and Comprehensive Planning

- Grimes Comprehensive Plan Update - *Grimes, IA*
- Kermit Comprehensive Plan - *Kermit, TX*
- Shawnee Comprehensive Plan Update - *Shawnee, OK*

Specialty Districts

- Maize Academy Arts District - *Maize, KS*
- Grand Forks Downtown Plan - *Grand Forks, ND*
- Omaha Neighborhood Plans - *Omaha, NE*
- Wichita South Central Neighborhood Plan - *Wichita, KS*

Transportation and Mobility Studies

- Garden Plain Pedestrian & Bicycle Plan - *Garden Plan, KS*
- Derby Walkable Development Plan - *Derby, KS*
- Goddard Pedestrian & Bicycle Master Plan - *Goddard, KS*
- Park City Pedestrian Connectivity Plan - *Park City, KS*

Corridor Redevelopment

- College Avenue - *Fayetteville, AR*

Park and Recreation Plans

- Grimes Parks Master Plan - *Grimes, IA*

CONTACT:

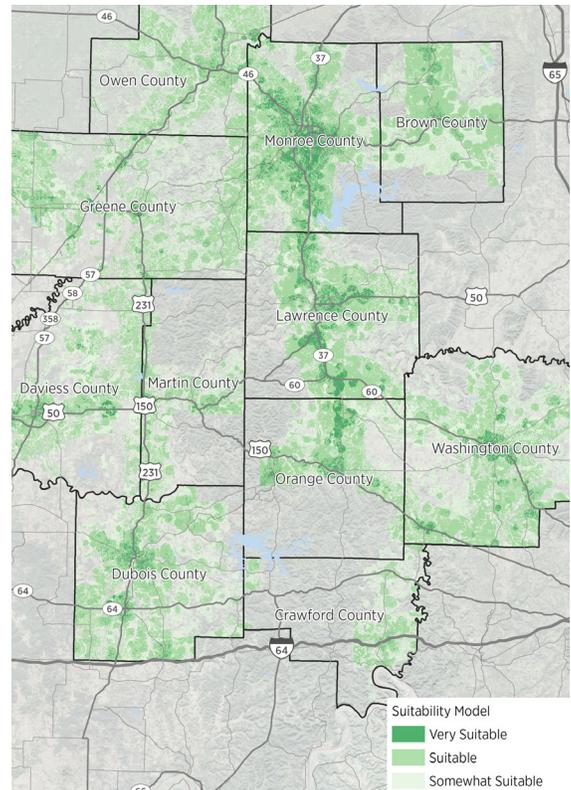
Brett Kelly
402.449.0862
bkelly@rdgusa.com



housing study experience

Indiana Uplands SOUTHERN INDIANA

The Indiana Uplands Housing Study covers an 11 county area in southern Indiana. The counties have a diverse range of opportunities, from the home of the University of Indiana, to some of the largest tourist destinations in Indiana, and even some of the most rural settings in the state. Housing issues across the region have common themes, but the strategies for moving forward differ. The final plan will outline strategies on both a local and regional level and will leverage the regions great assets. This plan is scheduled to be completed in early 2019.



REFERENCE:

Lauren Travis
 Assistant Director of
 Sustainability
 City of Bloomington
 401 N Morton St.
 Bloomington, IN 47404
 812.349.3837
 lauren.travis@
 bloomington.in.gov



housing study experience

Lincoln Affordable Housing Coordinated Action Plan

LINCOLN, NEBRASKA

Lincoln is a growing city of over 285,000 people that has historically maintained relatively affordable housing compared to similar cities. However, in recent years the city has struggled to maintain and increase the supply of quality affordable housing. Several public, private, and non-profit partners are already working on affordable housing. Therefore, the role of the housing coordinated action plan is to identify gaps and develop a plan of action through coordinated efforts and structures. Gaps are being identified through a community survey, targeted public outreach, and market analysis.



REFERENCE:

Wynn S. Hjermstad
Community Development
Manager
City of Lincoln, Urban
Development Department,
Livable Neighborhoods Division
555 S. 10th St., Suite 205
Lincoln, NE 68508
402.441.8211
whjermstad@lincoln.ne.gov



community & regional planning

Iowa Housing Study

DES MOINES, IOWA

The Iowa Housing Study used extensive public outreach and rigorous economic analysis to identify the most critical housing needs for Iowans. RDG gathered input from housing experts and members of the public at 40 meetings in 16 different locations across the state, while economic analysts at Gruen Gruen + Associates identified current and future trends in Iowa's housing demand and supply. The team used this combination of objective and subjective findings to provide guidance for the Iowa Finance Authority, which provides state-wide funding and assistance for affordable housing.



**OWNER
REFERENCE:**
Mickey Carlson,
Grants Manager
2015 Grand Avenue
Des Moines, IA 50312
515.725.4969
Mickey.Carlson@iowa.gov





We are proud to have helped many communities throughout the country with their planning and housing needs. Please take a few moments to contact any of the below references regarding our technical expertise, past record of performance on similar projects, and our familiarity with the challenges facing many communities throughout the region.

PAUL BRISENO

City Manager
City of Brookings, South Dakota
pbriseno@cityofbrookings.org
605.692.6281

Projects:

- *Kearney Housing Plan*
- *Hays Comprehensive Plan*

JONAS ARJES

Taney County Housing Study
Executive Director
Taney County Partnership
jarjes@taneycountypartnership.com
417.337.250

TINA PETERSON

Indiana Uplands Regional Housing Strategy
President & CEO
Regional Opportunity Initiatives, Inc.
tinapeterson@regionalopportunityinc.org
812.287.8116



estimated costs

We pride ourselves on working closely with our clients to create projects that are designed to meet their unique needs. The scope and fee laid out in this proposal is the beginning of this process, and therefore may be negotiated to better match the needs of Story County.

Story County Housing	Base
Project Management	\$5,500
Citizen Participation/Stakeholder Outreach	\$14,700
Discovery and Analysis	\$13,700
Opportunities Map	\$7,500
County Housing Needs Assessment	\$9,500
Fee Estimate	\$50,900
Expenses (Fuel, Lodging, Printing 7 copies) Not to Exceed	\$900
Total Labor and Reimbursable Expenses	\$51,800
<i>City of Ames Profile Excluding Item 1-7</i>	<i>\$8,340</i>
<i>City of Ames Profile Excluding Item 4</i>	<i>\$1,500</i>

PAYMENT PROCESS

We bill our projects monthly in proportion to the percent of total project work completed. Total amount billed will not exceed the agreed-upon fee as outlined in the contract at the start of the project. No additional hourly or other fees will be added.



CAPITAL IMPROVEMENTS PLAN



STORY COUNTY, IOWA

DRAFT JANUARY 2020

Story County Board of Supervisors
900 6th Street
Nevada, Iowa 50201

www.storycountyiowa.gov

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CAPITAL IMPROVEMENTS PLAN

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Introduction

The Story County Capital Improvements Plan (CIP) is a multi-year guide to the construction and/or improvement of county facilities and the acquisition of equipment. Through the process of preparing and updating this CIP, the County meets the need for orderly maintenance of the County's physical assets. This CIP is intended to serve as a planning tool and is structured to present meaningful long-range perspective of the County's long-range capital needs and to be used as an implementation tool for the acquisition, development, construction, maintenance, and renovation of public facilities, infrastructure, and capital equipment.

The Story County Board of Supervisors first identified the development of this Plan in the May 2013 Strategic Plan adopted by the Board and have adopted a CIP each following year. The CIP runs on a fiscal year basis – July 1st through June 30th, and defines projects on a five year timeframe.

The CIP adopts the 5-Year Story County Secondary Road Construction Program, updated and adopted annually, by reference.

The following project timeframes are identified in this current CIP:

Current Projects	Those in the current FY cycle (FY20)
Year 1	FY 21: July 2020 – June 2021
Year 2	FY 22: July 2021 – June 2022
Year 3	FY 23: July 2022 – June 2023
Year 4	FY 24: July 2023 – June 2024
Year 5	FY 25: July 2024 – June 2025



CAPITAL IMPROVEMENTS PLAN

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Process to Develop CIP

It is anticipated that the CIP is reviewed annually and is updated as necessary. Preparation of the CIP is an interactive process that takes approximately four to six months each cycle. The CIP is developed in a manner consistent with approved County financial policies that set guidelines for the CIP and for the funding of maintenance and replacement projects.

Elected Officials and Department Heads were asked to submit proposed projects in December 2019 in line with the initial budget preparations. County staff members reviewed proposed projects and identified those to recommend to the Board of Supervisors to include in the CIP. As budgets were prepared and submitted, additional projects were included as identified through the Board of Supervisors' worksessions in January 2020.

The projects are categorized beginning on page seven by year as noted above. The CIP is not meant to be a static document - it is intended to help the Board of Supervisors in their budgeting discussions and prioritization. As a guiding document, it may be amended as warranted.



CAPITAL IMPROVEMENTS PLAN

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Terms and Definitions

Story County has defined key terms in order to help guide the development of this CIP.

Capital Assets

Capital assets include land, facilities, parks, playgrounds and outdoor structures, special projects from Secondary Roads, pedestrian and bicycle systems, water and sewer infrastructure, technology systems and equipment, and other items of value from which the County derives benefit for a significant number of years.

Capital Projects

Capital projects result in economic activities that lead to the acquisition, construction, or extension of the useful life of capital assets. They have a total project cost in the range of \$25,000 or more; range from construction of new buildings to renovations, additions, conversions, or demolitions of existing buildings; have a useful life of five years or longer, significantly extend the useful life of an asset, or significantly alter the nature and character of an asset (not to include annual asset maintenance costs, annual warranty costs or other ongoing costs.)

The CIP includes four different types of projects: equipment, new project/construction (and project continuation to following years), modification of existing project, and maintenance.

- ◆ Equipment

The proposed purchases/lease/rental of equipment, including vehicles, software, hardware, and other applications when the costs exceed \$75,000.

Projects such as new building(s), land acquisition, remodels, and related items costing over \$25,000 are included and identified in one the following three categories:

- ◆ New Project/Construction
- ◆ Modification of Existing Project (includes project extension)
- ◆ Building Maintenance



CAPITAL IMPROVEMENTS PLAN

Projects

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Projects are listed in order of potential fiscal year in which the project may be undertaken. However, as this is a dynamic document, project schedules may change and be moved up or down on the timeframe, due to many factors, such as budget, staffing, and priorities. Also, estimated amounts and potential funding sources are meant only as guidance in this document. Elected Officials, Department Heads, and the Board of Supervisors identify the projects and funding mechanisms in the annual budget process.

The following is a list of projects that have gone through the CIP process and have been completed:

- Motor Grader Leases
- Phone System Replacement
- Dakin's Lake Expansion
- CLP Admin Building Roof Replacement
- Security Cameras for County Buildings
- Justice Center Well-Field Buy-Out
- Praeri Rail Trail Extension Planning
- Body and In-Car Camera Lease Agreement
- Election Equipment
- Keyless Entry Panels Replacement
- Animal Shelter Purchase
- Hickory Grove Campground Shower Building and Storm Shelter Construction
- Paving of Grant Avenue from 190th to Gilbert City Limits
- Paving of 600th Avenue from US Hwy 30 to Lincoln Highway
- West 190th Bridge Replacement
- 660th Avenue Bridge Replacement
- Dakins Lake—Vault Toilet
- Core Switch Replacements
- Jordan Acres Land Acquisition
- Tandem Truck Purchase
- U.S.A.C.E Land Acquisition
- Phase 1 - Tedesco Environmental Learning Corridor—Design and Mobilization
- Human Services Center Generator
- Sensitive Areas Inventory Update (Phase 1)
- Secondary Roads Building Improvements—Roland and Kelley Sheds
- Animal Shelter Improvements—Phase 1 (Architectural/Engineering Design)
- Purchase and Installation of Emergency Communications Center Furniture
- Carroll Prairie Acquisition
- Net App Replacement



CAPITAL IMPROVEMENTS PLAN

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- Continued

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- Loader Purchase
- Animal Shelter Improvements—Phase 2 (Construction to Architectural Specifications)
- Praeri Rail Trail Extension Construction
- Hickory Grove Watershed Improvement Project (Managed by IDNR) and Trail Extension
- Heart of Iowa Nature Trail Paving Phase 1 (Construction)
- Sensitive Areas Inventory Update (Phase 2)
- Phase 2 —Tedesco Environmental Learning Corridor Construction
- Hickory Grove Beach House
- McFarland Park – Sidewalk Improvements
- Justice Center Roof Replacement Project
- e-Pollbooks
- IRVM Spray Truck
- IRVM Building Addition
- Justice Center HVAC Replacement—Phase 1
- IT Server Room Heat Pump Replacements
- Tractor with Mower
- Dump Truck Purchases (3 units)



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2020 *Current Year*

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Department	Animal Control
Project Name	Animal Shelter Livestock Building

Type of Project New Project/Construction

Potential Funding Source(s) Friends of Animals Fund

Estimated Budget Amount \$42,000

Department	Conservation
Project Name	U.S.A.C.E Land Acquisition

Type of Project New Project/Construction - Continuation

Potential Funding Source(s) Energy Transfer Fund

Estimated Budget Amount \$36,000

Project Name	Hickory Grove Sewer
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Conservation Reserve
<i>Estimated Budget Amount</i>	\$50,000

Project Name	Phase 3 — Tedesco Environmental Learning Corridor Construction
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Type of Project New Project/Construction - Continuation

Potential Funding Source(s) TIF Revenue Bond, REAP

Estimated Budget Amount \$1,758,050

Project Name	Renewable Energy Cabin Study
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Type of Project New Project/Construction

Potential Funding Source(s) General Fund

Estimated Budget Amount Up to \$60,000 (TBD)



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2020 *Current Year*

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Department	Facilities Management
<i>Project Name</i>	Justice Center HVAC Equipment Replacement—Phase 1
<i>Type of Project</i>	Maintenance
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$434,000

Department	Secondary Roads
<i>Project Name</i>	Motor Grader Lease
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	Rural Fund
<i>Estimated Budget Amount</i>	\$250,000

Department	Sheriff, Facilities, Conservation, Secondary Roads, Board of Supervisors
<i>Project Name</i>	Countywide Interoperable Communications System
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund (bonded)
<i>Estimated Budget Amount</i>	\$1,500,000

FISCAL YEAR 2020 - TOTAL PROJECTS \$4,130,050



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2021

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Department	Conservation
Project Name	McFarland Park - Lake Restoration (Design)
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, IDNR
<i>Estimated Budget Amount</i>	\$50,000
Project Name	Heart of Iowa Nature Trail Paving Phase 2 (Construction)
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	State and Federal Grants, General Fund, Energy Transfer Fund
<i>Estimated Budget Amount</i>	\$1,077,000
Project Name	Heart of Iowa Nature Trail Paving (in Slater)
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, State and Federal Grants
<i>Estimated Budget Amount</i>	\$132,000
Project Name	Hickory Grove Park - Road Resurfacing
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$180,000
Project Name	West Peterson Park Vault Toilet
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	REAP
<i>Estimated Budget Amount</i>	\$52,000
Project Name	U.S.A.C.E Land Acquisition
<i>Type of Project</i>	New Project/Construction - Continuation
<i>Potential Funding Source(s)</i>	Conservation Reserve, General Fund
<i>Estimated Budget Amount</i>	\$46,000
Project Name	Hickory Grove Sewer
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Conservation Reserve
<i>Estimated Budget Amount</i>	\$700,000



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Projects—Fiscal Year 2021

Department Facilities Management

Project Name Justice Center HVAC Replacement Phase 2/Phase 3 Engineering

Type of Project Maintenance

Potential Funding Source(s) General Fund

Estimated Budget Amount \$490,000

Project Name County Wide Space Needs Study

Type of Project New Project/Construction

Potential Funding Source(s) General Fund

Estimated Budget Amount \$35,000

Project Name Administration Building Generator Capacity Increase

Type of Project New Project/Construction

Potential Funding Source(s) General Fund, Grants

Estimated Budget Amount \$633,000

Project Name Story County Attorney Remodel

Type of Project Modification of Existing Project

Potential Funding Source(s) General Fund, Fines Recovery

Estimated Budget Amount \$629,000

Department Information Technology

Project Name NetApp Storage Device

Type of Project Equipment

Potential Funding Source(s) General Fund

Estimated Budget Amount \$85,000

Department Secondary Roads

Project Name Motor Grader Lease

Type of Project Equipment

Potential Funding Source(s) Rural Fund

Estimated Budget Amount \$250,000



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2021

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Department	Secondary Roads—continued
<i>Project Name</i>	Excavator Purchase

<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	Secondary Roads Fund
<i>Estimated Budget Amount</i>	\$315,000

Department	Sheriff, Facilities, Conservation, Secondary Roads, Board of Supervisors
<i>Project Name</i>	Countywide Interoperable Communications System

<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund (bonded)
<i>Estimated Budget Amount</i>	\$1,115,134

FISCAL YEAR 2021 - TOTAL PROJECTS \$5,789,134



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2022

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Department	Conservation
Project Name	Hanums Mill Lowhead Dam Restoration
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, IDNR, Energy Transfer Fund
<i>Estimated Budget Amount</i>	\$500,000
Project Name	Hickory Grove Park—Road Resurfacing
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$600,000
Project Name	McFarland Park—Lake Restoration (Construction)
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, IDNR
<i>Estimated Budget Amount</i>	\$500,000
Project Name	Oriole Ridge Lodge Restroom
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, Conservation Reserve
<i>Estimated Budget Amount</i>	\$80,000
Project Name	Hickory Grove Primitive Campground Restroom
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, Conservation Reserve
<i>Estimated Budget Amount</i>	\$80,000



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2022

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Department	Conservation—continued
Project Name	Hickory Grove Campground Design
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, Conservation Reserve
<i>Estimated Budget Amount</i>	\$80,000
Project Name	Shelter/Gathering Area at West Peterson Park
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$40,000
Project Name	TELC Improvements—Parking Lot, Restroom, Storage Shed
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund, Grants, TIF
<i>Estimated Budget Amount</i>	\$460,000
Project Name	Skunk River Water Trail Access Improvement
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Grants
<i>Estimated Budget Amount</i>	\$50,000
Project Name	Skunk River Greenbelt Acquisition—South
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Conservation Trust Fund
<i>Estimated Budget Amount</i>	\$90,000 (total project cost FY22-27 is \$540,000)



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Projects—Fiscal Year 2022

Department	Facilities Management
<i>Project Name</i>	Justice Center HVAC Replacement Phase 3
<i>Type of Project</i>	Maintenance
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$640,000
<i>Project Name</i>	Justice Center Fire Alarm Replacement
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$57,000
Department	Secondary Roads
<i>Project Name</i>	Motor Grader Lease
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	Rural Fund
<i>Estimated Budget Amount</i>	\$250,000
Department	Sheriff's Office
<i>Project Name</i>	Multi-Purpose Training Facility
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$TBD (Dependent on County Wide Space Needs Study)

FISCAL YEAR 2022 - TOTAL PROJECTS \$3,427,000



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Projects—Fiscal Year 2023

Department	Conservation
Project Name	Skunk River Greenbelt Acquisition—South

<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Conservation Trust Fund
<i>Estimated Budget Amount</i>	\$90,000 (total project cost FY22-27 is \$540,000)

Project Name	Hickory Grove Park - Road Resurfacing
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<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$175,000

Department	Facilities Management
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Project Name	Justice Center Outbuilding Storage Construction
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<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$675,000

Project Name	Administration Building Infill Addition—Planning and Study
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<i>Type of Project</i>	Modification of Existing Project
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$1,500,000



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Projects—Fiscal Year 2023

Department	Facilities Management —continued
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<i>Project Name</i>	Justice Center, Courthouse and Building Security, Sheriff Climate Controlled Storage Construction
<i>Type of Project</i>	Modification of Existing Project
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$1,900,000

Department	Secondary Roads
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<i>Project Name</i>	Motor Grader Lease
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	Rural Fund
<i>Estimated Budget Amount</i>	\$250,000

Department	Sheriff's Office
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<i>Project Name</i>	Mobile Computers with Accessories
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$137,500

<i>Project Name</i>	Range Grounds Improvements
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$90,000

FISCAL YEAR 2023 - TOTAL PROJECTS \$4,817,500



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2024

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Department	Conservation
<i>Project Name</i>	Skunk River Greenbelt Acquisition—South
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Conservation Trust Fund
<i>Estimated Budget Amount</i>	\$90,000 (total project cost FY22-27 is \$540,000)

Department	Secondary Roads
<i>Project Name</i>	Motor Grader Lease
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	Rural Fund
<i>Estimated Budget Amount</i>	\$250,000

FISCAL YEAR 2024 - TOTAL PROJECTS \$340,000



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Projects—Fiscal Year 2025

Department	Conservation
Project Name	Skunk River Greenbelt Acquisition—South
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	Conservation Trust Fund
<i>Estimated Budget Amount</i>	\$90,000 (total project cost FY22-27 is \$540,000)
Department	Facilities Management
Project Name	Human Services Center - New Roof and ERV
<i>Type of Project</i>	Maintenance
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	TBD
Project Name	Justice Center Parking Lot Resurfacing
<i>Type of Project</i>	New Project/Construction
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$132,000
Department	Secondary Roads
Project Name	Motor Grader Lease
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	Rural Fund
<i>Estimated Budget Amount</i>	\$250,000



CAPITAL IMPROVEMENTS PLAN

Projects—Fiscal Year 2025

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Department	Sheriff's Office
<i>Project Name</i>	Patrol and Investigations Recording Equipment
<i>Type of Project</i>	Equipment
<i>Potential Funding Source(s)</i>	General Fund
<i>Estimated Budget Amount</i>	\$221,000

FISCAL YEAR 2024- TOTAL PROJECTS \$693,000



CAPITAL IMPROVEMENTS PLAN

Project Summary

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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)
Animal Control	Animal Shelter Livestock Building	New Project or Construction	2020	\$42,000	Friends of Animals Fund
	Animal Control FY20 Project Total			\$42,000	
Conservation	U.S.A.C.E Land Acquisition	New Project or Construction (Continuation)	2020	\$36,000	Energy Transfer Fund
	Hickory Grove Sewer	New Project or Construction	2020	\$50,000	Conservation Reserve
	Phase 3— Tedesco Environmental Learning Corridor Construction	New Project or Construction (Continuation)	2020	\$1,758,050	TIF Revenue Bond, REAP
	Renewable Energy Cabin Study	New Project or Construction	2020	\$60,000	General Fund
	Conservation FY20 Project Total			\$1,904,050	
	McFarland Park - Lake Restoration	New Project or Construction	2021	\$50,000	General Fund, IDNR
	Heart of Iowa Nature Trail Paving Phase 2 (Construction)	New Project or Construction	2021	\$1,077,000	State and Federal Grants, Energy Transfer Fund, General Fund
	Heart of Iowa Nature Trail Paving (In Slater)	New Project or Construction	2021	\$132,000	General Fund, State and Federal Grants
	Hickory Grove Park - Road Resurfacing	New Project or Construction	2021	\$180,000	General Fund
	West Peterson Park Vault Toilet	New Project or Construction	2021	\$52,000	REAP



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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)	
Conservation	U.S.A.C.E. Land Acquisition	New Project or Construction (Continuation)	2021	\$46,000	Conservation Reserve, General Fund	
	Hickory Grove Sewer	New Project or Construction	2021	\$700,000	Conservation Reserve	
	Conservation FY21 Project Total			\$2,237,000		
	Hanums Mill Lowhead Dam Restoration	New Project or Construction	2022	\$500,000	General Fund, IDNR, Energy Transfer Fund	
	Hickory Grove Park—Road Resurfacing	New Project or Construction	2022	\$600,000	General Fund	
	McFarland Park—Lake Restoration (Construction)	New Project or Construction	2022	\$500,000	General Fund, IDNR	
	Oriole Ridge Lodge Restroom	New Project or Construction	2022	\$80,000	General Fund, Conservation Reserve	
	Hickory Grove Primitive Campground Restroom	New Project or Construction	2022	\$80,000	General Fund, Conservation Reserve	
	Hickory Grove Campground Design	New Project or Construction	2022	\$80,000	General Fund, Conservation Reserve	
	Shelter/Gathering Area at West Peterson Park	New Project or Construction	2022	\$40,000	General Fund	
	TELC Improvements—Parking Lot, Restroom, Storage Shed	New Project or Construction	2022	\$460,000	General Fund, Grants, TIF	



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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)	
Conservation	Skunk River Water Trail Access Improvement	New Project or Construction	2022	\$50,000	Grants	
	Skunk River Greenbelt Acquisition—South	New Project or Construction	2022	\$90,000	Conservation Trust Fund	
	Conservation FY22 Project Total			\$2,480,000		
	Skunk River Greenbelt Acquisition—South	New Project or Construction	2023	\$90,000	Conservation Trust Fund	
	Hickory Grove Park - Road	New Project or Construction	2023	\$175,000	General Fund	
	Conservation FY23 Project Total			\$265,000		
	Skunk River Greenbelt Acquisition—South	New Project or Construction	2024	\$90,000	Conservation Trust Fund	
	Conservation FY24 Project Total			\$90,000		
	Skunk River Greenbelt Acquisition—South	New Project or Construction	2025	\$90,000	Conservation Trust Fund	
	Conservation FY25 Project Total			\$90,000		
Facilities Management	Justice Center HVAC Replacement - Phase 1	Maintenance	2020	\$434,000	General Fund	
	Facilities Management FY20 Project Total			\$434,000		



CAPITAL IMPROVEMENTS PLAN

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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)
Facilities Management	Justice Center HVAC Replacement - Phase 2/Phase 3 Engineering	Maintenance	2021	\$490,000	General Fund
	County Wide Space Needs Study	New Project or Construction	2021	\$35,000	General Fund
	Administration Building Generator Capacity Increase	New Project or Construction	2021	\$633,000	General Fund
	Story County Attorney Remodel	Modification of Existing Project	2021	\$629,000	General Fund, Fines Recovery
	Facilities Management FY21 Project Total			\$1,787,000	
	Justice Center HVAC Replacement - Phase 3	Maintenance	2022	\$640,000	General Fund
	Justice Center Fire Alarm Replacement	New Project or Construction	2022	\$57,000	General Fund
	Facilities Management FY22 Project Total			\$697,000	
	Justice Center Outbuilding Storage Construction	New Project or Construction	2023	\$675,000	General Fund
	Administration Building Infill Addition— Planning and Study	Modification of Existing Project	2023	\$1,500,000	General Fund



CAPITAL IMPROVEMENTS PLAN

Project Summary

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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)
Facilities Management	Justice Center, Courthouse and Building Security, Sheriff Climate Controlled Storage Construction	Modification of Existing Project	2023	\$1,900,000	General Fund
	Facilities Management FY23 Project Total			\$ 4,075,000	
	Human Services Center - New Roof and ERV	Maintenance	2025	TBD	General Fund
	Justice Center Parking Lot Resurfacing	New Project or Construction	2025	\$132,000	General Fund
	Facilities Management FY25 Project Total			TBD	
Information Technology	NetApp Storage Device	Equipment	2021	\$85,000	General Fund
	Information Technology FY21 Project Total			\$85,000	
Secondary Roads	Motor Grader Lease	Equipment	2020	\$250,000	Rural Fund
	Secondary Roads FY20 Project Total			\$250,000	
	Motor Grader Lease	Equipment	2021	\$250,000	Rural Fund
	Excavator Purchase	Equipment	2021	\$315,000	General Fund
	Secondary Roads FY21 Project Total			\$565,000	



CAPITAL IMPROVEMENTS PLAN

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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)
Secondary Roads	Motor Grader Lease	Equipment	2022	\$250,000	Rural Fund
	Secondary Roads FY22 Project Total			\$250,000	
	Motor Grader Lease	Equipment	2023	\$250,000	Rural Fund
	Secondary Roads FY23 Project Total			\$250,000	
	Motor Grader Lease	Equipment	2024	\$250,000	Rural Fund
	Secondary Roads FY24 Project Total			\$250,000	
	Motor Grader Lease	Equipment	2025	\$250,000	Rural Fund
	Secondary Roads FY25 Project Total			\$250,000	
Sheriff, Facilities, Conservation, Secondary Roads, Board of Supervisors	Countywide Interoperable Communications System	New Project or Construction	2020	\$1,500,000	General Fund (bonded)
	Sheriff, Facilities, Conservation, Secondary Roads, Board of Supervisors FY20 Project Total			\$1,500,000	
	Countywide Interoperable Communications System	New Project/Construction - Continuation	2021	\$1,115,134	General Fund (bonded)
	Sheriff, Facilities, Conservation, Secondary Roads, Board of Supervisors FY21 Project Total			\$1,115,134	
Sheriff	Multi-Purpose Training Facility	New Project or Construction	2022	TBD	General Fund
	Sheriff FY22 Project Total			TBD	



CAPITAL IMPROVEMENTS PLAN

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Offices and Departments	Project Name	Type of Project	Fiscal Year	Estimated Budget Amount	Potential Funding Source(s)
Sheriff	Mobile Computers with	Equipment	2023	\$137,500	General Fund
	Range Grounds Improvement	New Project or Construction	2023	\$90,000	General Fund
	Sheriff FY23 Project Total			\$227,500	
	Patrol and Investigations Recording Equipment	Equipment	2025	\$221,000	General Fund
	Sheriff FY25 Project Total			\$221,000	

CAPITAL IMPROVEMENTS PLAN



The Board of Supervisors adopted the first Capital Improvements Plan for Story County in February 2014. The steps towards the CIP adoption and implementation started in May 2013, with the identification of the CIP on the Board's Strategic Plan, stating:

Develop Capital Improvements Program

Benefits: Better schedule public improvements that require more than one year to construct. Provide an opportunity for long-range financial planning and management.

The adopted CIP runs on a fiscal year basis – July 1st through June 30th, and defines projects on a five year timeframe. It will be reviewed annually and updated as necessary.



Lauris Olson



Linda Murken



Lisa Heddens

www.storycountyiowa.gov



CAPITAL IMPROVEMENTS PLAN TIMEFRAME FY2021-2025

Timeframe	Tasks	Comments
October 15, 2019	BOS Approve Forms, Process and Timeline	
October 15 th - December 6 th	CIP Request Forms prepared by EO/DH	Forms are due on or before 5:00 pm on Friday, December 6, 2019 – submitted to Leanne Harter
<i>From December 4 – 6: staff available to discuss projects and finalize paperwork.</i>		
Week of December 9 th	CIP Review Committee Meeting #1	Initial review of projects and existing CIP and budget discussion
December 12 th	Worksession with BOS	
December 17 th – 20 th	CIP Review Committee Meeting #2	Discussion of projects to be included
Draft CIP prepared and distributed for BOS Budget Worksessions		Distributed prior to January 3, 2020
January 8, 2020	CIP Budget worksession with BOS	Additional discussions on the projects will occur through the individual worksessions as well.
Week of January 13 th	Staff compile changes to Draft CIP	
January 28, 2020	BOS review of Draft CIP	Discussion and direction to seek public input
January 28, 2020 – March 3, 2020	Public Comment Period	
March 3, 2020	BOS review of public input	Direction on revisions to be brought forth on March 24 or 31, 2020 (at same time of budget hearing)
March 24 or 31, 2020	Formal Adoption of CIP	Formal action occurs after adoption of the budget
Formal CIP Adoption - runs on a fiscal year basis.		
Project Timeframes		
FY20	July 2019 – June 2020	Current Year
FY21	July 2020 – June 2021	Year 1
FY22	July 2021 – June 2022	Year 2
FY23	July 2022 – June 2023	Year 3
FY24	July 2023 – June 2024	Year 4
FY25	July 2024 – June 2025	Year 5