

**PLANNING DEPARTMENT  
MEMORANDUM 14 -26**

**DATE:** November 24<sup>th</sup>, 2014  
**TO:** Honorable Mayor Joyce Downing and City Council Members  
**FROM:** John Pick, City Manager   
Brook Svoboda, Director Planning & Development   
**SUBJECT:** CR-121 Citywide Sustainability Assessment, Award Professional Services  
Agreement to Economic Planning Systems

---

**BACKGROUND**

The Citywide Sustainability Assessment will examine, assess and make recommendations regarding:

- City fiscal policies
- Prioritization of Development & Redevelopment Opportunities
- Level of Service
- Community Vision – Council’s goals and objectives / Comprehensive Plan

The project will develop a working program that will:

- Identify a fiscally sustainable path for Northglenn’s future
- Establish a programmatic approach to redevelopment opportunities
- Incorporate Northglenn’s “Community Vision”
- Inform future decision making to reduce risk and uncertainty concerning redevelopment and fulfilling community vision

**SELECTION PROCESS**

**Request for Qualifications**

Six (6) formal proposals were received by the City on October 7<sup>th</sup> as solicited by an RFQ (Request for Qualifications) titled Citywide Sustainability Assessment. The proposals were evaluated by City staff based on the following quantitative criteria:

- |                                       |   |
|---------------------------------------|---|
| • Team Organization                   | • Technical Expertise                                 |
| • Firm Qualifications                 | • Public / Political Communication Engagement         |
| • Relevant Experience                 | • Innovative Approach/Additional value to the project |
| • Individual Qualifications (Resumes) |   |
| • Overall Expertise                   |   |

The review committee met to review the quantitative results, and performed a qualitative exercise to validate the quantitative results. The top three (3) candidates were the same for each exercise. The three (3) candidates were then qualified as finalists to submit formal proposals and invited for interviews (per the City’s RFQ provisions). Below are the respondents ranked in order of their final results:

- |   |                      |
|---|----------------------|
| 1. Tishler Bise / Orion Planning Group              | 4. BBC Research      |
| 2. Economic Planning Systems / MIG                  | 5. Ricker Cunningham |
| 3. ArLand Land Use Economics /PUMA/<br>Craig Kocian | 6. DMFG              |

**Finalist’s Selection**

Each of the three finalists were provided instructions for preparing a scope of work proposal, and a presentation/interview, which included four prescribed questions. The interview committee used a qualitative rating process that considered the following criteria:

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| • Scope of work proposal             | • Council / NURA Engagement Strategy |
| • Value of proposal to cost          | • Presentation                       |
| • Specialized Services / Value Added | • Responses to Interview Questions   |

Once the qualitative scoring was completed, the interview committee met to review results and made a final recommend for selection. The ranking for the finalist's process was as follows (fee proposal included)

- Economic Planning Systems / MIG \$170,120.00
- ArLand Land Use Economics /PUMA/ Craig Kocian \$165,000.00
- Tishler Bise / Orion Planning Group \$162,620.00

Economic Planning Systems was identified as the most qualified firm to provide these services to the City. Key deciding factors that established Economic Planning Systems as the preferred candidate are as follows:

- Understanding of Goals and Objectives of Project: Demonstrated a detailed understanding of the project scope.
- Council/NURA Engagement: Provided most innovative and comprehensive approach to engaging and communicating to Council and NURA.
- Final Deliverables: The final deliverable work product would perform as a “living document,” which was consistent with the expectations of the project – an updateable model that would be able to reflect changing conditions in the community. Additionally, Staff would be trained to use the final product moving forward as opposed to requiring updates to be done by a third party.

**BUDGET/TIME IMPLICATIONS**

**2014 Citywide Sustainability Assessment**

City Council	\$100,000.00
NURA	\$75,000.00
<u>Economic Planning Systems (Exhibit B Amt of Compensation)</u>	<u>(\$170,120.00)</u>
<b>Total Project Budget</b>	<b>(\$170,120.00)</b>
 Remaining Project Balance	 \$4,880.00

City Council approved a supplemental appropriation for 2014 in the amount of \$50,000 for this project. It is estimated that approximately \$25,000 of the \$50,000 will be used by the end of the calendar year. Staff is recommending to add \$75,000 to the Planning Department Budget when Council considers the adoption of the 2015 Budget at the December 8<sup>th</sup> Council Meeting, for the remainder of the project. NURA has reflected their \$75,000 commitment in the 2015 Budget. Their commitment is limited, based on the areas of the plan contained within the Urban Renewal Area(s). NURA will reimburse the City for their share of the project.

**PROJECT SCHEDULE**

The overall project has a schedule of eleven months which is included in Exhibit A of the PSA. The timing will largely be tied to study session availability.

**RECOMMENDATION**

Attached to this memorandum is a Council Resolution 121 that, if approved, would:

Authorize the Mayor to execute a contract between the City of Northglenn and Economic Planning Systems Inc. for the **Citywide Sustainability Assessment**, in the amount of **\$170,120.00**

Staff recommends approval of the proposed CR-121.

**STAFF REFERENCE**

Brook Svoboda, Director of Planning & Development [bsvoboda@northglenn.org](mailto:bsvoboda@northglenn.org) or 303.450.8937

**ATTACHMENTS**

- ATTACHMENT 1 Clerk Certification of Bid Summary & Bid Tabulation
- ATTACHMENT 2 Request for Qualifications submittal package







**Request for Qualifications (RFQ)  
Cover Sheet**

**Title:** Citywide Sustainability Assessment

**Purpose of Solicitation:**

See RFQ Scope of Services for detailed explanation  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Mailed, delivered or e-mailed responses to RFQ shall be marked as follows: \_\_\_\_\_  
Citywide Sustainability Assessment

**Submission Deadline:** 3:00 PM on Oct 7th , 2014

**Submit To:** City Clerk's Office  
11701 Community Center Dr Northglenn CO 80233  
or  
rfp@northglenn.org  
or  
[www.govbids.com](http://www.govbids.com)

**Contact:** Brook Svoboda, Dir. Planning & Dev

**Email:** bsvoboda@northglenn.org

**Phone:** 303-450-8937

There is no guarantee that the City will utilize the services of any vendors responding to this request for qualifications. An RFP will be offered at a later time to those vendors that meet the majority of our needs. At that time, proposal instructions will be available and may be found at [www.govbids.com](http://www.govbids.com). E-mail is the preferred method of submittal. Please respond to each question in your own words, and do not attach any additional marketing documents to this response. **In order to continue in the process, a written response to this RFQ is necessary.**

PRINT OR TYPE YOUR INFORMATION

Company Economic & Planning Systems, Inc. Phone Number 303.623.3557

Address 730 17th Street, Suite 630 City, State Zip Denver, CO 80202

Contact Person Andrew Knudtsen Title Managing Principal

Email aknudtsen@epsdenver.com Phone 303.623.3557 x101

Signature \_\_\_\_\_

Print Name Andrew Knudtsen

*The Economics of Land Use*



## Qualifications

# Citywide Sustainability Assessment

Prepared for:

City of Northglenn, Colorado

Prepared by:

Economic & Planning Systems, Inc.

in collaboration with The MIG logo consists of three squares: a blue square with a white letter 'M', a yellow square with a white letter 'I', and a grey square with a white letter 'G'.

*Economic & Planning Systems, Inc.  
730 17th Street, Suite 630  
Denver, CO 80202-3511  
303 623 3557 tel  
303 623 9049 fax*

*Oakland  
Sacramento  
Denver  
Los Angeles*

**[www.epsys.com](http://www.epsys.com)**

October 7, 2014

EPS #143068

October 7, 2014

Ms. Brook Svoboda  
Director Planning & Development  
City of Northglenn  
11701 Community Center Drive  
Northglenn, CO 80233

Subject: Citywide Sustainability Assessment; EPS #143068

Dear Brook:

Economic & Planning Systems (EPS) is pleased to provide you with this Statement of Qualifications for the Citywide Sustainability Assessment. The City of Northglenn is facing challenges as it looks at recent trends concerning its economic base. Given that the city's retail sector has been contracting, the City is taking proactive steps to maintain the Level of Service (LOS) the community desires. How the City proceeds on redevelopment opportunities (of both publicly and privately held sites) will have a substantial impact on its fiscal strength as well as quality of life.

EPS is well positioned to assist the City in addressing the issue of economic sustainability. We can draw from a depth of experience involving fiscal modeling, LOS analysis, site inventory evaluation and policy formation. We can deliver a depth of technical expertise and build on the work staff has already completed to provide the Council with a comprehensive understanding of its options. We have worked with many elected officials and understand how to provide technical findings that enables boards to make informed, grounded decisions.

EPS has invited MIG to join the team and this proposal includes background information on both firms. We recognize that the City's primary emphasis is on economic sustainability and would structure the team and work program to reflect that priority. MIG's involvement should be viewed as a resource to show high-level concepts for redevelopment concepts. EPS and MIG have worked extensively together and believe that visual depictions of redevelopment can answer questions and build cohesion among board members, as they consider different land use scenarios.

#### **EPS Overview**

EPS is a full-service economic consulting firm with 44 professional staff and offices in Denver, Colorado, and Oakland, Los Angeles, and Sacramento, California. Founded in 1983, the firm has a broad-based practice in real estate and land use economics including market and financial analysis, fiscal impact fee analysis, and land use policy. EPS has worked successfully with a wide range of public and private sector clients and has established a reputation for both creativity and rigor in resolving complex public and private real estate and land use issues.

*The Economics of Land Use*



*Economic & Planning Systems, Inc.  
730 17th Street, Suite 630  
Denver, CO 80202-3511  
303 623 3557 tel  
303 623 9049 fax*

*Oakland  
Sacramento  
Denver  
Los Angeles*

**[www.epsys.com](http://www.epsys.com)**

## **MIG Overview**

MIG, Inc. is a multidisciplinary firm that specializes in urban design, public outreach, consensus building, and communications. We offer a full range of services, including streetscape design, zoning, site planning, and policy formation. Our work is characterized by a dedication to quality, a flexible approach, creativity in planning and design, and a commitment to completing projects on time and within budget. Since 1981, we have worked extensively with public agencies and municipalities nationally and internationally on design and planning for future change.

## **Contact Information**

- The lead firm is Economic & Planning Systems
- The project manager will be Andrew Knudtsen, Managing Principal with EPS. He can be reached at (303) 623-3557 [aknudtsen@epsdenver.com](mailto:aknudtsen@epsdenver.com)
- EPS has reviewed the RFQ and follow up distributions from the City and is willing to conform to all City requirements.

We are excited about the opportunity to work on this project. We believe that few teams offer the breadth and depth of technical experience that can help create an economically sustainable future for the City of Northglenn and look forward to talking with you more.

Sincerely,

ECONOMIC & PLANNING SYSTEMS, INC.



Andrew Knudtsen  
Managing Principal

## Table of Contents

---

1.	TEAM ORGANIZATION .....	1
	Organizational Chart .....	2
2.	SUMMARY OF QUALIFICATIONS .....	3
	Project Understanding .....	3
	Qualifications .....	4
3.	RELEVANT EXPERIENCE.....	7
4.	FIRM DESCRIPTION .....	12
	About EPS.....	12
	Firm History .....	12
	Service Provided.....	12
	MIG, Inc. ....	13
5.	RÉSUMÉS .....	16



## **1. Team Organization**

## 1. TEAM ORGANIZATION

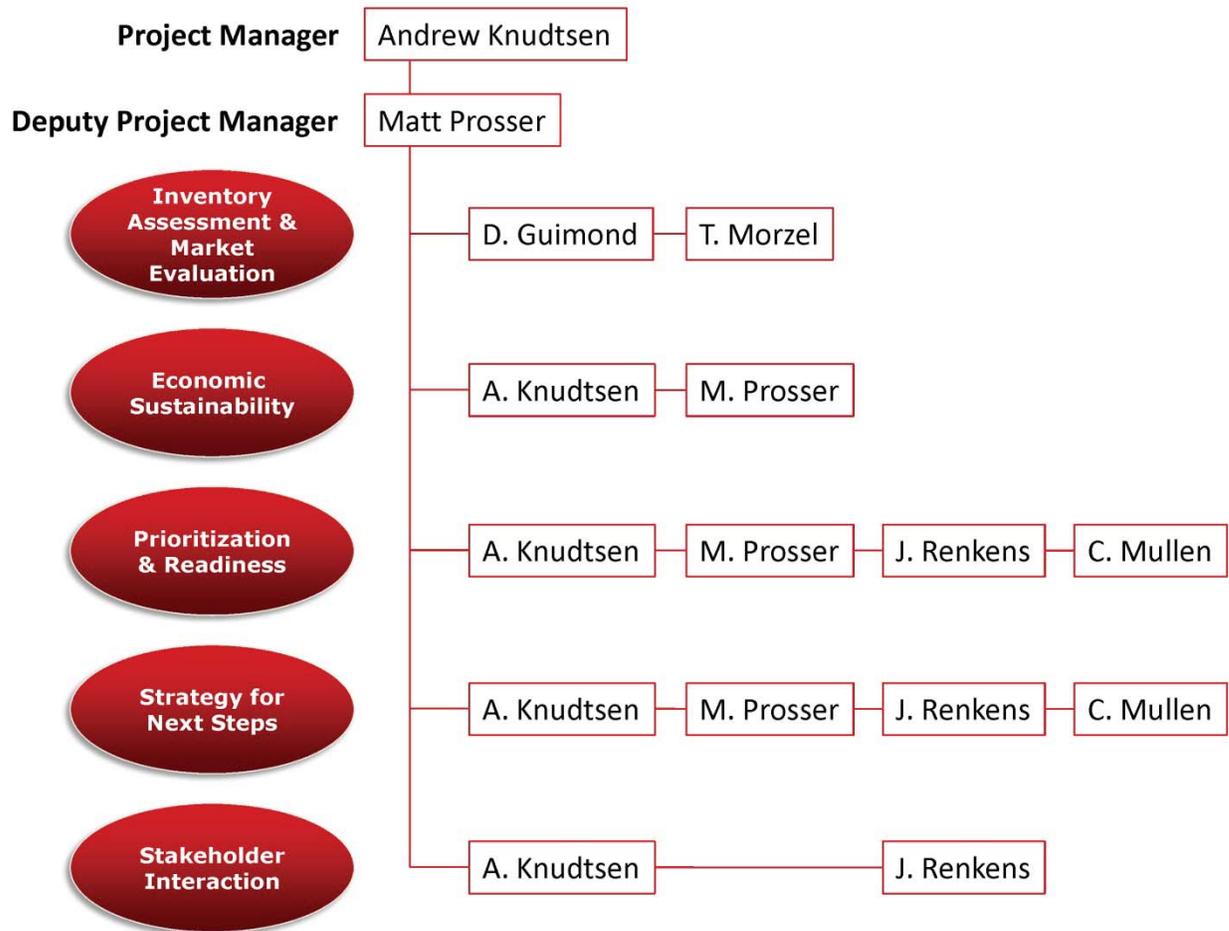
---

The team structure is shown in the organizational chart on the following page. The intent is to provide a consistent team of individuals that would be available for the staff, City Council, and NURA to interact with regularly. The primary staff contacts include **Andrew Knudtsen** as Project Manager and **Matt Prosser** as Deputy Project Manager and project analyst. Andrew and Matt have worked with similar clients for more than nine years and work seamlessly with clients.

We proposed to integrate **Jay Renkens** from MIG early in the process. Although any visualization work would not occur until later tasks, we believe it is important to introduce Jay to Council and NURA board members to insure the elected and appointed officials appreciate the collaborative nature of the EPS-MIG leadership. Jay, and his colleagues at MIG, excels in public process and he would bring his experience with numerous City Councils to the project.

In addition to the three individuals who would be available for day-to-day interaction with the City, there are a number of staff members in both EPS and MIG that would contribute to the project. **Daniel Guimond**, Principal and manager of the EPS Denver office, would provide direction as a Senior Advisor. Bringing nearly 40 years of consulting experience to the project, Dan is extremely well versed on the issues identified in the RFQ. Dan has conducted numerous retail studies in the Denver-metropolitan region and can draw from that knowledge base to quickly ground future development potentials in local market realities. **Tim Morzel** (EPS) and **Chase Mullen** (MIG) bring a level of technical expertise on the issues that will enable the project to keep pace and maintain schedule commitments.

## Organizational Chart





## **2. Summary of Qualifications**

## 2. SUMMARY OF QUALIFICATIONS

---

### **Project Understanding**

The project has been given good definition by staff, complete with a proposed work program. Below are five points which we believe highlight the key elements of a successful approach. We believe that the City will be well-served with a consultant that can:

#### ***1 – Evaluate Level of Service and the Fiscal resources to support the desired LOS.***

EPS has an extensive amount of experience constructing fiscal models. A good fiscal model is one that has built-in 'dials' that allow the City and Consultant to test different scenarios about future Level of Service requirements and the corresponding ability of the City's economic base to fulfill those needs. EPS has the technical depth to construct a model and use it to document alternative approaches to future build out and the corresponding implications on economic sustainability.

#### ***2 – Assess ROI.***

Understanding the City's Return on Investment appears to be central to the goal of the study. EPS has worked with many clients to define hard metrics and softer quality of life indicators that document how the community benefits based on different forms of investment. Because EPS is well versed in economics and land use, we are able to integrate forms of investment with different types of returns, recognizing that some returns are strictly financial (like fiscal base and revenue generation) and others are geared to the quality of the community (like amenities identified in the comprehensive plan).

#### ***3 – Integrate the views of City Council, NURA, and Staff.***

EPS works with many boards of elected and appointed staff members to define actionable plans. Our experience covers the gamut from boards with a narrow focus and high technical expertise to those that are more generalist in nature. EPS has been effective with both, largely due to our incremental, transparent approach to data, modeling, and analysis. More importantly, we are highly collaborative and enjoy the process of working with Boards. We measure our success not by the bulk of our deliverables but by the degree of buy-in from the client team.

#### ***4 – Provide a Vision for Infill and Remaining Development Sites***

EPS and MIG have worked on many projects together, addressing issues of infill development, its viability, and its impact on fiscal sustainability. As a firm specializing in urban design, MIG brings the ability to visualize the concepts and clarify terms. For example, the term "density" can mean very different things to a board of elected officials. MIG will be able to provide high-level graphics (not site specific) to illuminate different development approaches. The primary deliverable continues to focus on fiscal sustainability, with the benefit of urban design typologies to provide a frame of reference for the elected officials.

#### ***5 – Clarify the Path Forward.***

Much work as already been done of the issue of Citywide Sustainability. The challenge is to build on that work, address the specific issues with research addressing fiscally sustainable options, and then develop an implication plan that enables the City to take steps forward. This is not easily done. It requires a combination of high quality technical analysis plus a high level of interaction with stakeholders. Time and time again, EPS has found this approach to be highly effective.

## Qualifications

EPS has provided a summary of team qualifications below, structured around the five major elements defined by the work program. The intent is not to describe tasks to be completed, but rather to convey the experience EPS and MIG bring to the work program that has already been defined. The goal is to communicate the breadth of understanding the team brings to these tasks and to begin to collaborate on the best ways to execute them.

### Inventory and Assessment

EPS has created a number of data bases for clients in which the supply of development opportunities are quantified and tabulated to enable future prioritization. We enjoy this type of land based classification and look for ways to incorporate creative metrics to illuminate the attributes of a given site. The RFQ listed a range of property features and also showed results of an assessment already completed by staff. EPS suggests building on this work and rounding out the data base with a focus on revenue-generation attributes (sales taxes, property taxes, PIFS, districts, fees, etc.). In addition, land values, lease rates, vacancy trends, and other market data can easily be added to show how the market views a given site. Finally, in previous work, we have found that a comparison of a given site's conditions with a metro-area average (or Northern I-25 subarea average) is particularly insightful. We can provide location quotients that show the degree of superior (or subpar) performance relative to these larger geographies that in turn informs the team on ways to structure an effective implementation strategy.

It is important to recognize that the future economic base of the City of Northglenn is rooted in its market position. What is Northglenn's market position today? What could it be in five years? In ten years? EPS had conducted extensive market research for retail, residential, and office/industrial uses throughout the Denver-metro market, and has advised clients on ways to position their properties relative to current and future market conditions. IN terms of infill/redevelopment/catalytic real estate plays, the central question is influence the market such that it performs at a higher level in the future.

EPS can translate the data set into user-friendly maps and graphics that facilitate dialogue with elected officials. For example, EPS could 'heat map' the city in terms of fiscal revenue generation. We could then tabulate the big generators against all the factors identified to determine the attributes the City needs to try to replicate. When we have done similar assessments in the past, we build the data base with the prioritization task in mind. Data can be displayed two dimensionally and even three dimensionally to show important factors affect redevelopment potential. The goal is to portray findings that enable elected officials to quickly understand the research that has been completed and the implications of the findings. The data base is intended to be 'owned' by staff in the future and easily updated to make it relevant in the future.

### Economic Sustainability

EPS has a depth of experience constructing fiscal models for cities. We understand the complexities involved and how to address one-time and on-going revenues as well as one-time and on-going expenditures. We understand variability and how to model future growth, given that it will not have the same unit-for-unit impact as the base. We understand the different between average cost factors and marginal cost factors and which to use for infill analysis. Fiscal modeling is not simple and building a thorough model is needed to reach informed decisions.

A good model will enable the City to test a range of assumptions around future build out. It will be important to develop a set of inputs that can be varied around LOS assumptions and development potential assumptions. Generally, LOS discussions are those involving fiscal expenditures and a good model will have clarity about the current level of service and how future inputs reflect and increase (or decrease) in those levels. A good model can be built to 'work both directions.' In other words, derive the LOS available to the City based on inputs to the future land use of vacant/redevelopment sites. Alternatively, derive the composition of future development to maintain current LOS. Finally, a hybrid between these two analyses will focus on policy. How should the City treat redevelopment and vacant sites such that it can facilitate development and maintain a solid fiscal base? What options exist? What are 'given's' that drive secondary (and tertiary) priorities? These discussions become simpler to answer with a good model. The four scenarios listed in the RFQ are not complex. Results will show the implications for the advantages and disadvantages of each. The research on Intangible Benefits can be coupled with the specific model outputs to frame a 'top down' and 'bottom up' analysis of the City's options.

For this task, we would encourage the City to utilize the EPS partner on this project, MIG. EPS and MIG have partnered on many projects involving infill redevelopment. MIG is an urban design firm and has the capacity to show how different types of future development compare to each other. Some variation that the City may want to consider include small/large scale; auto oriented/pedestrian oriented; higher intensity/lower intensity; and/or other factors that may emerge over the course of the project.

The purpose of involving MIG's design expertise is to show how the financial implications differ by type of redevelopment. The intent is not to plan various properties. The goal is to develop typologies for different scales of redevelopment that could be applied across the City's vacant/redevelopment land inventory. Not every typology will fit on every site. Some will be better suited than others. EPS and MIG will develop the typologies with a rubric to apply them to the appropriate sites.

The EPS/MIG team would be able to upload the typologies into the model to show how each perform. Without getting too specific, the team could run a typology at a certain scale that would be analogous to a given opportunity. While this approach involves more runs and more alternatives than anticipated in the RFQ, the EPS/MIG team believes that a well-organized set of typologies and assumptions can be run through the model and incorporated into the analysis.

## **Prioritization**

One of the strengths EPS brings to the project is a depth of experience using metrics to create hierarchy among of pool of potential development sites. Our work with public sector clients including cities, housing authorities, and transit authorities has enabled us to conduct this screening process many times. We understand how to aggregate a large, diverse set of data and apply it to specific parcels to create priorities. The metrics used to assess the options can be diverse. It is recommended to capture a wide array of data points to reflect the various factors affecting a given site's likelihood to be developed and EPS is prepared to collaborate with staff to determine the appropriate collection of data points.

The City has opportunities for Public-Private-Partnerships (or Joint Development) on the properties it owns as well as an opportunity to play a significant role on privately held sites by authorizing the use of Tax Increment Financing or other forms of public finance. EPS has been directly involved on a wide range of PPP negotiations. We can construct pro forma to document the returns available to the development team and determine the amount of gap closure needed to achieve viability. Partitioning the IRR by team member is a critical task needed to ensure that the public entities (in this case the City of Northglenn and the Northglenn Urban Renewal Authority) have reasonably defined positions with returns that are commensurate with degree of risk. EPS can cover a range of bases in this component of the work, from the initial analysis to assess general feasibility to specific partnership formation and definition of terms.

For this project, we believe that EPS should provide an initial screen of sites to confirm general viability and then test for the magnitude of gap closure that might be needed. We can provide analysis regarding sale or lease mechanisms and can document how the sale and/or revenue stream compensates the City based on reasonable market value. Recognizing the value that a non-profit can bring the City, as an additional layer to conventional measures of return, can be incorporated given the desire of the City and URA to accommodate nonprofits and elevate their mission.

### **Strategies for Implementation**

The plan will add value to the community as it implemented. Clearly delineated roles for the City and for NURA will be critical as part of future steps. The plan must prioritize the sequence of sites that warrant action on the part of the City and/or NURA, addressing plans and policies and well as public financing and incentives for the development that will fulfill the objectives of the City. Sustainable fiscal health and an expanded economic base are the key to maintaining future LOS.

EPS has provided a variety of implementation strategies for comprehensive plans, infill studies, catalyst sites, and corridor plans. We provide short-, mid-, and long-term actions to enable quick implementation on the actions most within the purview of the City. We also incorporate milestone measurements, to enable staff and elected officials to monitor the pace of implementation. Finally, we incorporate a set of metrics that can be used to monitor the effectiveness of the plan. These can be used to alter course, to ensure the original goals – fiscal sustainability and LOS support – can be fulfilled.

### **Council Engagement Strategy**

Integrating staff, the NURA board, and the City Council is paramount for the action plan to be implemented. The challenge is to present analysis that is highly technical in nature and enable the elected and appointed officials to move through the findings and feel confident that the process has been comprehensive and balanced.

EPS and MIG have worked extensively with boards over many years. We have found that moving incrementally through complex issues with frequent interface is effective. We have structure elected official Academies in other jurisdictions and suggest using this model as we create a communication and engagement strategy. This approach provides a platform for education across a number of topics, such as economic base theory, multiplier effect, fiscal structure, etc. We have used this on previous projects and found it helps communities achieve their goals.



### **3. Relevant Experience**



## Comprehensive Plan Initial Studies

### Client

City of San Antonio, Texas

### Relevancy to the City of Northglenn

- **Evaluation of Capacity for Infill Development** using market demand and land supply analysis
- **Fiscal Model Construction** that will document City revenues and expenditure and net fiscal conditions under different development scenarios
- **Fiscal Policy Analysis** of the City's tools to incent redevelopment and the benefit from redevelopment on the City's fiscal balance
- **Typology Development** for different types of land uses in the commercial centers

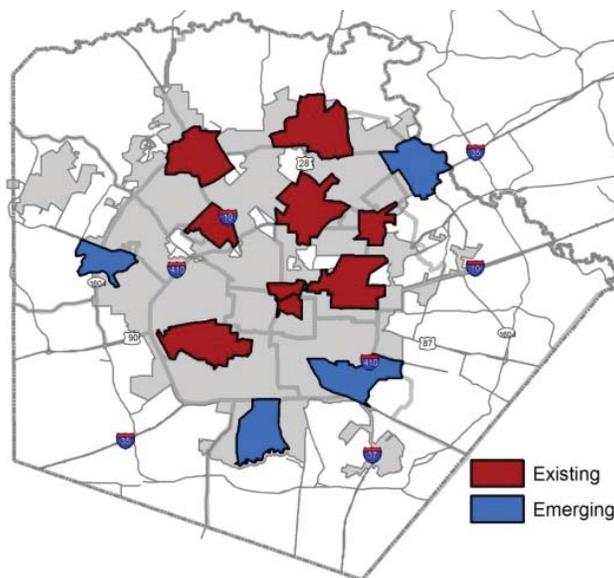
### Project Description

San Antonio, Texas is the seventh largest city in the U.S. and part of one of the fastest growing metropolitan areas in the country. The Alamo Area Metropolitan Planning Organization has forecast that the City will grow by half a million households and jobs by 2040. In order to facilitate this amount of growth, San Antonio needed to document the City's capacity for growth, market trends by sub-region and demand for infill redevelopment.

The City hired EPS to complete three studies to inform their comprehensive planning effort. The three components of the project included an infill development capacity study (component 1), a future economic opportunities analysis and jobs and housing market demand study (component 2), and a fiscal impact analysis of growth scenarios (component 3). The findings from components 1 and 2 were used to create a market based growth forecast for the City of San Antonio and its extra territorial jurisdictions. EPS generated a growth forecast for the City, which was used by the Alamo Area MPO for its metro-wide growth forecasts. Based on research of drivers and market trends, EPS identified 13 major activity centers within the City that are forecast to attract half of all future employment. The growth forecast within the City and the activity centers was based on a comprehensive analysis of the future economic growth potential in San Antonio's key driving industries. Forecasts for development associated with the growth forecast were created and tailored to match the real estate patterns of the employment within the key driving industries. The City will focus on ways to accommodate and incent future development within the activity centers as well as create connectivity between them as part of the City's comprehensive planning efforts.

EPS is currently completing component 3 of the study. This last component will measure the fiscal impact of new development by various development typologies to help the City understand the fiscal impact of their land use policies. EPS will also identify key infrastructure improvements that can facilitate infill development within the activity centers and the cost to the City to complete these projects.

### San Antonio Activity Centers



### Reference

Trish Wallace  
Transportation Planning Manager  
Transportation and Capital Improvements  
City of San Antonio  
(210) 207-0217  
[Patricia.Wallace@sanantonio.gov](mailto:Patricia.Wallace@sanantonio.gov)

### Project Team

Andrew Knudtsen, Principal-in-Charge and Project Manager  
Matt Prosser, Project Analyst

### Schedule

Project extension required to accommodate data collection from diverse range of City departments.

10/2013-Ongoing



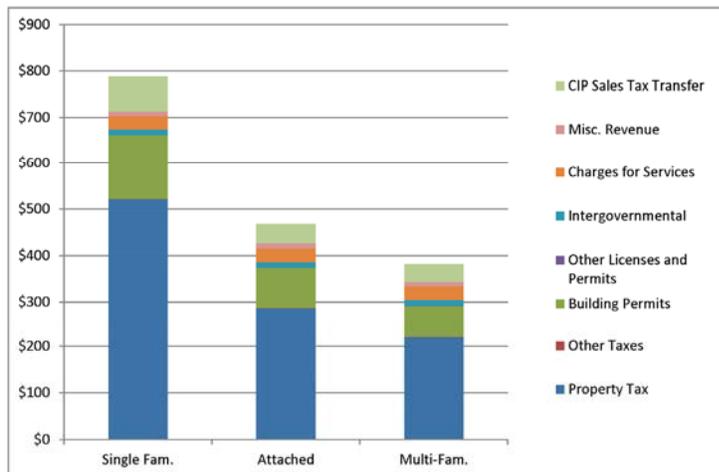
# Adams County Comprehensive Plan

## Client

Adams County, Colorado

## Relevancy to City of Northglenn

- **Fiscal Model** construction that required a comprehensive documentation of county-wide costs and revenues and multiple 'dials' that enabled the staff and consultant team to test different land use development scenarios.
- **Elected Official** presentations that required elected officials to make complex fiscal policy decisions. Enabled County to implement new policies regarding development in unincorporated areas, primarily based on findings from fiscal scenario testing.
- **Staff Education** that included a detailed user manual on the fiscal model. Goal was to enable staff to update model and use it on a regular basis to evaluate future land use issues.



## Project Description

Adams County is a large, diverse county in the Denver metropolitan area, with a population of nearly 500,000. It includes some of the most densely populated areas within the region, a large industrial base, fast-growing suburban areas, and rural farming and ranching communities. Adams County hired EPS as part of a larger consulting team lead by Clarion Associates to prepare a comprehensive plan update.

## Reference

Able Montoya  
 Planning and Development Director  
 Adams County Colorado  
 (720) 523-6842  
[amontoya@adcogov.org](mailto:amontoya@adcogov.org)

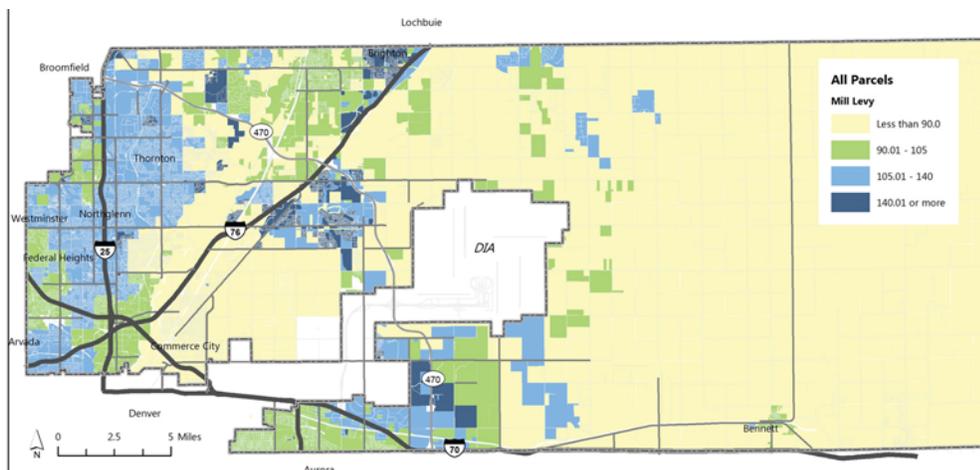
## Project Team

Andrew Knudtsen, Principal  
 Matt Prosser, Project Manager

## Schedule

Project completed on time and budget  
 5/2012-12/2012

To help inform the comprehensive planning process, EPS prepared a fiscal impact analysis of future growth scenarios to highlight the implications of various scenarios on the County's bottom line. The analysis highlighted the fiscal impacts of specific uses on the County in incorporated and unincorporated portions of the County. The resulting plan is based on a vision for "A More Sustainable and Resilient Adams County." EPS prepared a fiscal impact model (both countywide and project specific) as a tool to help inform decision-making as the plan is implemented over time. EPS also created economic development plan policies and created growth projections to inform land use decisions.



## Diagonal Plaza Redevelopment Study

### Client

City of Boulder, Colorado

### Relevancy to City of Northglenn

- **Distressed Retail Center** with aging infrastructure, lower than average rents and higher than average vacancies
- **Fiscal Analysis** to document the revenues to be generated to the City of Boulder before and after renovation
- **Feasibility Analysis** to test overall project viability, to size the gap needed for public financing, and to define a potential role for the City and BURA
- **Market Research** to identify potential anchor tenants not currently in the market

### Project Description

In response to significant land constraints for new commercial development, the City of Boulder identified Diagonal Plaza, a 250,000 square foot aging commercial strip center in North Boulder, as one of the few remaining sites in the urban core for regional retail uses. The recent loss of the anchor grocer and several other key tenants, the related decline in retail sales, and the physical condition of a large portion of the center all served as motivations for potential redevelopment.

EPS, in conjunction with an interdisciplinary planning and design team, assisted the City in providing a preliminary feasibility assessment of the center's physical and economic potential for redevelopment under three potential scenarios. As part of this analysis, EPS determined the market potentials for a variety of regional and community retail uses, as well as mixed-use residential development. EPS then provided estimates of project costs, including acquisition, parking, and horizontal and vertical development. The feasibility of each scenario was tested using a static rate of return and projected potential revenues from both future land sales and vertical development value. The related future tax revenues were also estimated for potential use in public financing, including urban renewal.

### Deliverables

- Feasibility analysis
- Next steps alternatives

### Outcomes

Center re-tenanting

### Reference

Liz Hanson  
Economic Vitality Coordinator  
Department of Planning and Sustainability  
City of Boulder  
(303) 441-3287  
[HansonL@bouldercolorado.gov](mailto:HansonL@bouldercolorado.gov)



### Project Team

- Dan Guimond, Project Manager
- Andrew Knudtsen, Project Analyst
- OZ Architecture

### Schedule

Project completed on time and budget  
9/2010-12/2012

## White Rock Center Master Plan/Investment Strategy

### Client

Los Alamos County, New Mexico

### Relevancy to City of Northglenn

- **Distressed Commercial Center** that needed revitalization in a challenging market context
- **Market Analysis** to document the degree of market support that could be achieved
- **Fiscal Analysis** of revenue generation from project and potential use of County funds to incent the project

### Project Description

EPS was economic consultant on a multidisciplinary team with MIG to prepare a redevelopment plan for historic commercial core of the White Rock neighborhood in Los Alamos County, New Mexico. The White Rock commercial area has experienced significant decline as many retail businesses have moved out and relatively few office and service jobs exist. The isolation of White Rock—which is separated from the town site by the San Ildefonso Indian Reservation Land, the Santa Fe National Forest, and LANL property—has contributed to commercial decline and discouraged new businesses from entering the market area.

EPS conducted market studies for the full range of potential land uses, including residential, retail, and office development. The project evaluated the development potential for the commercial core and identified an opportunity to build a mixed use town center with a series of public and private catalyst projects. These projects were intended to kick start redevelopment of the area. EPS evaluated the financial feasibility of three of the major catalyst projects, including a mixed-use building, community center complex, and regional visitor center. Finally, EPS developed an investment strategy for the area that included a financial plan and action plan for implementing the catalyst projects and key public improvements in the plan.



### Reference

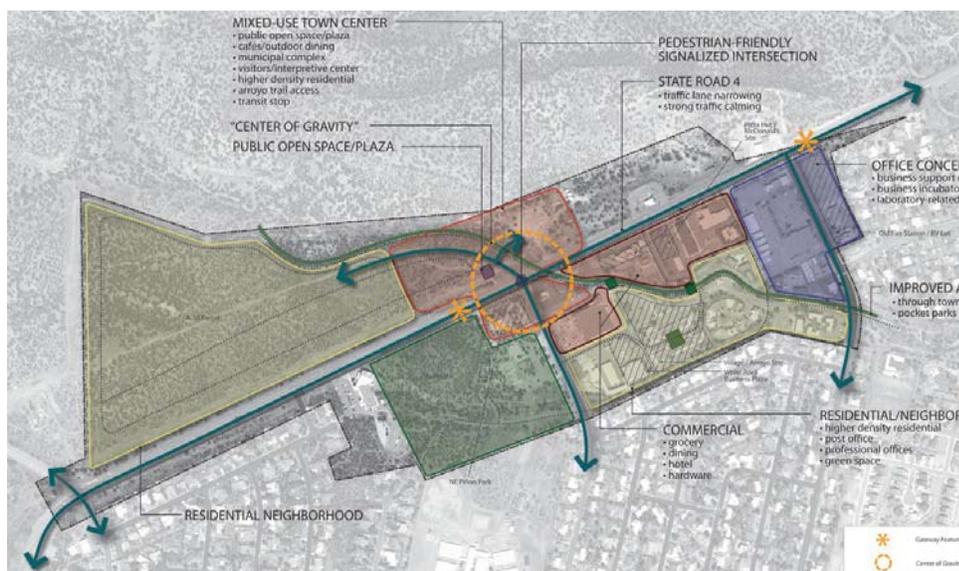
Steve Brugger (formerly with Los Alamos County)  
Affordable Housing Administrator  
Santa Fe County  
(505) 992-6752  
[sbrugger@santafecountynm.gov](mailto:sbrugger@santafecountynm.gov)

### Project Team

Daniel Guimond, Principal-in-Charge  
Andrew Knudtsen, Project Manager  
Matt Prosser, Project Analyst  
Jay Renkens, Land Planner and Designer

### Schedule

Project completed on time and budget  
5/2012-12/2012





# Aspen Affordable Housing Strategic Plan

## Client

City of Aspen, Colorado

## Project Description

The City of Aspen had an inventory of acquired or available sites suitable for development of affordable housing as well as two dedicated revenue streams designed to support this type of development (a sales tax and real estate transfer tax). However, because of intense community debate about the impacts from growth and sprawl and the costs of affordable housing subsidies, there had been no new affordable housing proposals for several years and no clear direction on how to proceed.

The City of Aspen retained EPS to provide a strategy for increasing the inventory of affordable housing in the city. The primary purpose of the strategy was to help the City understand where it could leverage its resources and capitalize on the greatest opportunities in a cost effective manner. EPS grounded the strategy with a housing needs assessment, which provided aggregate targets for housing production, as well as goals for specific income levels. EPS evaluated multiple housing development options, including those involving the public and private sectors. Based on detailed pro forma models developed for seven sites and three prototypical infill projects, EPS prioritized the development opportunities using policy-based evaluation criteria, which included the relative subsidies required for each site. In addition, a financial analysis of the costs and revenues associated with the aggregate housing program over a 10-year period was provided to document how the City could accomplish its goals. Based on the analysis provided by EPS, the City adopted the recommended 10-year action plan and proceeded with the highest priority project. The City also restructured the Housing Authority and staff based on recommendations contained in the plan.

## Reference

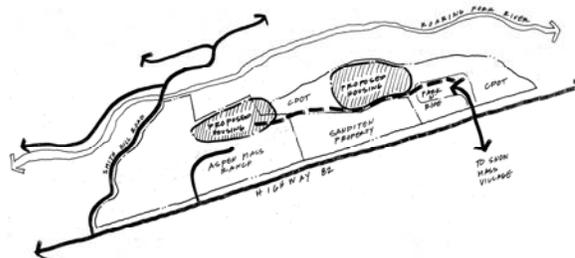
Chris Bendon  
 Community Development Director  
 City of Aspen  
 (970) 429-2765  
[chris.bendon@cityofaspen.com](mailto:chris.bendon@cityofaspen.com)

## Project Team

Walter Kieser, Principal-in-Charge  
 Daniel Guimond, Advisor  
 Andrew Knudtsen, Project Manager  
 Matt Prosser, Project Analyst

## Schedule

Project completed on time and budget  
 3/2001-2/2002



## ASPEN MASS - Context

Aspen Affordable Housing - Strategy Plan

February 2002

Criteria	Sites								
	Aspen Manor	Aspen Mass	Burlingame Ranch	The Gap	Parcel D	Rio Grande	Schlumberger	Truscott, Phase III	US Forest Service
<b>Development Factors</b>									
1 Readiness	Medium	Medium	Short	Medium	Short	Short	Medium	Long	Long
2 Optimal development potential	Positive	Negative	Positive	Positive	Neutral	Positive	Positive	Positive	Positive
3 Project Flexibility	Low	High	High	Low	Low	Low	Low	Low	High
4 Degree of Autonomy	Many	Few	Few	Many	Few	Sole	Many	Sole	Many
<b>Contribution to City's Comp. Plan</b>									
5 Contribution to City Comp Plan Goals	16	120	330	20	40	17	6	11	51
6 Net Gain in Housing Capacity	22.3	235	650	7.7	82	6.6	5.5	78	59.5
7 Land Use Compatibility	Neutral	Negative	Neutral	Neutral	Neutral	Positive	Neutral	Positive	Neutral
8 Proximity to transit	Yes	Yes	No	Yes	No	Yes	No	Yes	Yes
9 Community Benefit	Positive	Neutral	Neutral	Positive	Neutral	Positive	Positive	Neutral	Neutral
<b>Fiscal Impact to City's Funds</b>									
10 Cost of Investment in Site	-150,515	-53,208	-36,695	-10,455	-84,986	63,201	35,224	-117,402	-50,060
11 Net Subsidy after accounting for Revenue	-141,983	-50,046	-48,312	-38,630	-49,308	59,464	9,862	-59,234	-56,475

Source: Economic & Planning Systems



## **4. Firm Description**

## 4. FIRM DESCRIPTION

---

### About EPS



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

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

- Real Estate Market and Feasibility Analysis
- Public Finance
- Fiscal and Economic Impact Analysis
- Reuse, Revitalization, and Redevelopment
- Housing Development Feasibility and Policy
- Regional Economics and Industry Analysis
- Land Use Planning and Growth Management
- Transportation Planning and Analysis

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

The professional staff of 46 includes specialists in public finance, real estate development, land use and transportation planning, government organization, and computer applications. The firm excels in preparing concise analyses that disclose risks and impacts, support decision making, and provide solutions to real estate development and land use-related problems.

### Firm History

EPS formed April 1, 1983 in Berkeley, California and incorporated in California on December 21, 1987. Due to the area's growth a second office opened in Sacramento, CA in 1989. Sacramento's office growth led to a move to larger quarters in early 1990s, and again in 2005. EPS Denver office opened in 1999 with subsequent expansions in 2000 and 2008. In 2011 EPS opened an office in Los Angeles, California and in 2014 the Berkeley office moved to Oakland.

### Service Provided

#### Fiscal Impact Analysis Experience

EPS evaluates the impact of a wide range of land use projects and resource management programs on the annual budgets of cities, counties, and other public agencies. As a basis for practical mitigation measures, our services quantify and disclose the potential local and regional fiscal implications of specific projects, cumulative development of an area, or government actions in general. EPS evaluates net fiscal impacts by forecasting local government operating costs and revenues due to increased public service requirements and/or changes in tax and fee collection.

Fiscal impact studies are often completed within the context of land use plan evaluation, development project review, environmental impact reports, resource management plans, and financial negotiations between public and private entities. EPS utilizes specially prepared computer models that emulate and forecast agency budgets based on input from affected agencies as well as case studies from similar projects. Our analysis employs a wide variety of tools, including market analysis, consumer surveys, case studies, and industry sales data.

### **Real Estate Market and Feasibility Analysis**

EPS prepares real estate market and feasibility analysis for a diversity of real estate development projects and land use planning programs. Our services provide a realistic assessment of real estate market trends to determine the potential market support for a given project or land use plan. EPS's feasibility analysis evaluates the potential financial returns and feasibility of a real estate project, drawing upon our market research of product types, absorption, and pricing.

This market and feasibility information is used in a wide variety of applications, such as individual project feasibility assessment, development project design and programming, property disposition strategies, downtown revitalization and redevelopment efforts, specific and comprehensive land use planning, and economic analysis of impact fees and other public finance programs. The firm's market analysis efforts range from evaluations of existing market information to detailed project-specific market forecasts that utilize consumer surveys and other primary research. Pro forma cash flow models test feasibility under a range of project alternatives, financing, partnership options, disposition strategies, and measures of financial return.



MIG is a multidisciplinary firm that specializes in urban design, public outreach, consensus building, and communications. We offer a full range of services, including streetscape design, zoning, site planning, transit-oriented development planning, and policy formation. Our work is characterized by a dedication to quality, a flexible approach, creativity in planning and design, and a commitment to completing projects on time and within budget. Since 1981, we have worked extensively with public agencies and municipalities nationally and internationally on design and planning for future change.

At MIG, the diversity of our staff of 100 provides a base of knowledge that bridges technical expertise and values, and facilitates the exchange of information among all parties engaged in the planning process. Staff backgrounds encompass urban and regional planning, urban design, strategic planning, public participation, higher education planning, environmental design and research, landscape architecture, communications, graphic design, and public policy.

MIG's unique combination of planning and design expertise allows us to conduct technical planning in a highly interactive process involving all constituent groups. This process generates a clear and collective vision of development and growth in a dynamic, yet stable environment. Through MIG's participatory planning and design process, client goals and community interests work together to frame key issues. Plans created through this approach enjoy broad-based support and are readily implemented.

## **MIG Areas of Expertise**

### ***Community Planning and Design***

MIG offers a unique combination of community planning and urban design expertise that brings community interests together to frame land use, transportation, and urban design issues. From concept development to final planning and construction documents, MIG has a successful track record in the planning and design of environments that contribute to community livability and enable residents to lead healthy, active lifestyles.

MIG's urban designers work on a wide range of projects ranging from streetscape design and downtown revitalization to city-wide visioning and regional planning projects. Utilizing a variety of tools including land-use exercises, GIS mapping and analysis, computer simulations and slide shows, MIG engages stakeholders and builds consensus to ensure that the end result is a successfully implemented project.

### ***Innovative Planning Solutions***

Great places are attractive and innovative physical settings for human interaction. MIG's approach uses good planning and design to generate innovative solutions to the community's visual and functional order—creating a "sense of place" that helps make experiences memorable, functional and attractive to its many users. We take special care that our projects respond to the regulatory environment, regional and local climactic conditions, the ecological niche of the area, and the cultures and history of place.

Our goal is to provide a framework for the creation of well-designed places with pedestrian-scaled streets, thoughtful building form and scale, and great public places that respect the historic traditions and environmental qualities of the setting. Our specific plans and master plans are strategic, focused and turn-key, so that they don't just sit on a shelf. Instead, they are blueprints and guides that provide real results.

### ***Strategic Planning***

MIG provides a sophisticated, integrated approach to strategic planning that combines elements of organizational and leadership development, planning, operations, and stakeholder participation. Tailored to the distinctive conditions of each organization, our methods evoke creative solutions that lead to dynamic plans.

MIG has worked closely with clients in assessing organizational structure and operations, and developing strategic action plans for change and improvement. MIG develops and implements processes based on a thorough exploration of lessons learned, existing conditions and future opportunities and trends. MIG emphasizes collaborative thinking and problem solving; linking resource allocation to organizational values, goals and objectives; and developing effective performance and progress measures.

MIG has helped to put into operation the mission and vision statements of numerous agency clients to achieve the required alignment between planning and operations. Changing economic and demographic conditions have been a catalyst for organizational change. MIG has provided one-on-one coaching with senior staff and facilitated processes to help manage change. Many of these projects are driven by the need to prepare workforce succession plans to address the loss of staff knowledge and history as agencies and organizations prepare for the looming retirements of the Baby Boomer generation.

### ***Community Involvement, Facilitation and Consensus Building***

Our experience has shown that commitment from the community is strengthened when participants believe that their input and decisions make a real difference in their lives and the project area. Building on the success of innumerable successful planning processes, our approach involves community outreach, participation and planning processes through which stakeholders ranging from city leaders to citizens are intimately involved, so that they feel a direct responsibility for—and impact from—any decisions or actions. The result is a multi-leveled, well-documented process and plan that (1) fosters meaningful dialogue and widespread community participation, (2) reflects the community's desires, (3) has backing from a broad range of stakeholders, and (4) increases public confidence in decision-making and resource allocation.

MIG specializes in facilitative leadership techniques that go **beyond meeting management and help participants think creatively and work collaboratively**. MIG facilitators create an open atmosphere in which different viewpoints can be heard, acknowledged, addresses and reconciled. We have helped diverse groups of public and private sector clients to resolve conflicts and work toward common goals.

Specific forms of participatory process that MIG employs include: visioning exercises, videos, simulation modeling, information displays, web site development and multicultural outreach. We know that many details go into organizing a successful meeting, starting with clear objectives, appropriate and engaging discussions frameworks and exercises, and logistical preparation that is complete and professional. MIG carefully summarizes and documents all meetings to effectively convey participant comments to decision makers.

### ***Visualization Tools***

Visualization tools can be a valuable aspect of a design process to help members of the public, stakeholders, and City staff compare development concepts to existing conditions. MIG employs SketchUp to create high-resolution image files that can be used in a PowerPoint show, in print materials, or on websites. Using SketchUp, MIG staff can create a base model that shows the existing project area buildings, open spaces, and opportunities for connectivity. The model includes limited portions of the surrounding neighborhoods to provide context. The program can also create alternatives that test variations in building use, height, massing and location. Each alternative can be placed in context of the site using the existing conditions model so that viewers can see the relationship between potential design solutions and the existing context of the site. The model can create views for each alternative that highlight key features of, and differences between, the designs.

Working from the criteria established during the master site planning process, SketchUp can also create a final representation of the project, allowing viewers to see proposed uses, building massing, landscaping, public spaces and site amenities, building and roof details, and street furniture to represent the final vision of the built project as closely as possible. The program can also create an animated fly-through for the preferred alternative that highlights key features of the final design.



## 5. Résumés



---

# Andrew Knudtsen AICP, CCIM

Managing Principal



## Education

Bachelors of Environmental Design, Magna Cum Laude Univ. of Colorado, 1987

## Previous Employment

2007-2011  
Principal, Economic & Planning Systems, Inc.

2006-2007  
Executive Vice President  
Economic & Planning Systems

2004-2006  
Vice President  
Economic & Planning Systems

2001-2004  
Senior Associate  
Economic & Planning Systems

1998-2001  
Principal  
The Housing Collaborative, LLC

1994-1998  
Housing Planner, Town of Vail

1990-1994  
Senior Planner, Town of Vail

1988-1990  
Planning Associate  
City of Boulder

## Affiliations

CCIM – Certified Commercial Investment Manager

ULI – Member of the Colorado Executive Committee

AICP – American Institute of Certified Planners

State of Colorado Governor's Blue Ribbon Affordable Housing Panel

## Publication

"Urban-Suburbia", Urban Land, October 2008.

## ABOUT

Andrew Knudtsen is a planner and economist with 20 years' experience addressing the full range of economic issues related to real estate development. He has constructed models that integrate fiscal and economic analysis, enabling clients and elected officials to understand the economic and fiscal benefits, costs, and net conditions attributed to growth. His work also includes tailored models to project governmental revenues and expenditures based on expected development projections.

A specific application that Mr. Knudtsen has provided to local government is an integration of economic development modeling with fiscal analysis. His work has enabled communities to understand the degree of fiscal impact expected as a result of growth and how to mitigate costs. Andrew has worked extensively with public sector clients and understands how to present data in way that enables elected officials, staff, and community members to use the information to make informed decisions and move forward with implementation.

## SELECTED PROJECT MANAGEMENT EXPERIENCE

### Fiscal

#### **Adams County Fiscal Model, Adams County, CO**

Constructed fiscal model for county to document County revenues, expenditures, and capacity to meet Level of Service benchmarks. Loaded the model with alternative development scenarios to identify net costs to county. Worked directly with the Adams County BOCC to develop fiscally-grounded land use policies.

#### **Longmont Comprehensive Plan, Longmont, CO**

As part of the Comprehensive Planning effort, constructed a fiscal model for the City. Used model to document the net surplus (or deficit) under various land use build-out scenarios. Helped achieve a mix of land uses that would enable the City to fund operations and capital improvements at historic levels.

### Infill Redevelopment

#### **Highway 42 Urban Renewal Authority Analysis, Louisville, CO**

Evaluation of redevelopment potential in 55-acre urban renewal area adjacent to downtown. Completed market analysis and provided feasibility models for site-specific future projects. Evaluated public financing options and estimated bond proceeds under different development scenarios.

#### **Diagonal Plaza Redevelopment Study, Boulder, CO**

Assessed market potential for retail, office, and residential uses for aging retail center, representing a major infill opportunity in Boulder. Conducted feasibility analysis and developed TIF model to document proceeds available to the City for land acquisition, infrastructure, and other redevelopment costs.

### Site Prioritization

#### **VIA Metropolitan Transit Authority, San Antonio, TX**

Evaluated over 225 acres of real estate holdings in 13 parcels for the transit authority to rank and prioritize their real estate development program. Used numerous qualitative and quantitative metrics to assess the potentials for each parcel. Aggregated rankings under three categories including Development Readiness, Market Strength, and Transit Supportiveness.

**Affordable Housing Strategic Plan, Aspen, CO**

Assessed regional need for affordable housing then evaluated the City's revenues dedicated for affordable housing. Analyzed nine development sites and established soft and hard evaluative metrics to rank sites and set priorities for the City. EPS constructed a cash flow model to determine the adequacy of funding relative to need, which included multiple site-specific pro forma to document opportunities that provided the greatest leverage of City funds.

**PPP Feasibility Public Financing****Fredericks Road Joint Development, San Antonio, TX**

Represented transit agency in negotiations with developers seeking to build on land acquired by VIA for TOD projects. Built pro forma. Assessed degree of risk. Included public financing layers. Recommended partnerships in which returns were reasonable and VIA's interests were advanced.

**Denver Ball Park Urban Renewal Analysis, Denver, CO**

Provided feasibility analysis of an 18-acre redevelopment project adjacent to Denver's LoDo district. Evaluated the Denargo project for its market position and based on market inputs, assessed project feasibility and expected financial performance. Provided findings to DURA to underpin proposed TIF financing structure.

**Sustainability****City of Rifle Downtown Development Strategy, Rifle, CO**

Conducted market analysis of redevelopment potential. Ran feasibility analysis to test viability of projects. Identified public financing sources to close gaps. Structured developer solicitation process to form partnerships with City and private developers to build on City-owned parcels.

**Smart Growth Demand in Northern Rockies, CO, MT, and ID**

Documented the successes and failures of smart growth development in the Northern Rockies for the Sonoran Institute. Identified premium for smart growth and key drivers with greatest traction among residents. Used primary survey data, interviews, and secondary data to identify the socio-economic drivers of demand for six towns, estimated their correlation to capture rates and premiums, and provided direction about future needs for other Rocky Mountain communities.

**Regional Market Demand****Boulder Retail Strategy, Boulder, CO**

Citywide evaluation of regional retail development opportunities and a comparison of the benefits and impacts of alternative development options and tenancing strategies.

**Housing Demand Forecast, Oklahoma City, OK**

Housing demand study and citywide survey that assessed demand for housing by geography, age level, income, and preferences. Quantified housing demand by age, tenure, and income level, and identified elasticity of demand for various types and neighborhood qualities.



---

# Daniel R. Guimond

Principal

---



## Education

M.A., Urban Geography,  
University of Colorado, 1976

B.A., Political Science,  
University of Colorado, 1972

## Previous Employment

1999-present  
Principal  
Economic & Planning  
Systems, Inc.

1997-1999  
Principal, In Motion, Inc.

1993-1997  
Vice President, BRW Inc.

1978-1992  
Vice President, Hammer  
Siler, George Associates

1976-1978  
Planner, Jefferson County  
Planning Department

## Affiliations

American Institute of  
Certified Planners

Urban Land Institute

International Downtown  
Association

Denver Planning Board,  
1992 to 2005

ICSC Colorado Alliance

## ABOUT

Dan Guimond is an economist and planner with over 30 years' experience in economic and financial analysis and development planning for the public and private sectors. He has specialized in retail development/redevelopment feasibility analysis, including market studies for neighborhood and regional shopping centers, department stores, discounters, and grocery store chains. For the public sector, he has conducted citywide and district specific retail development strategies. Dan has extensive project experience with redevelopment projects including commercial corridors, aging facilities, infill sites, and transit-oriented development sites. His experience includes overall project management, evaluation of reuse potentials, development strategies, public and private financing, and developer selection and negotiation.

## SELECTED PROJECT MANAGEMENT EXPERIENCE

### Oklahoma City Retail Plan

Citywide retail development plan including analysis of citywide and subarea sales flows, identification and categorization of retail nodes, centers and corridors, performance evaluations, and development and revitalization policies and strategies.

### Midtown Corridor Redevelopment Study, Fort Collins, CO

Commercial corridor redevelopment plan including Foothills Mall redevelopment options, infill development potentials, opportunity site feasibility analysis, and public-private financing strategies and partnerships.

### Boulder Retail Strategy, Boulder, CO

Citywide evaluation of regional retail development opportunities and a comparison of the benefits and impacts of alternative development options and tenancing strategies.

### Longmont Retail Opportunities Study, Longmont, CO

Citywide and downtown retail development analysis and strategy including city sales tax analysis, competitive inventory, sales analysis, and investment strategy.

### Fort Collins Regional Retail Development, Fort Collins, CO

Retail studies to evaluate region's retail sales inflows and outflows, competitive development opportunities, and development incentives packages.

### Winrock Town Center Redevelopment, Albuquerque, NM

Market analysis, financial feasibility, public financing and fiscal impacts for the redevelopment of the former Winrock Mall as a mixed use town center redevelopment.

### Diagonal Plaza Feasibility Analysis, Boulder, CO

Evaluation of the market and financial feasibility of redevelopment options for an aging community shopping center.

### Cost of Development Retail Analysis, Aurora, CO

Sales tax revenue forecast analysis prepared as part of cost of growth study to evaluate development related costs and revenues and proposed impact fees and exactions.



---

# Matt Prosser

Senior Associate

---



## Education

Master of Urban & Regional Planning, University of Colorado at Denver, 2008

Bachelor of Environmental Design, University of Colorado at Boulder, 2005

## Previous Employment

2010-2013  
Associate  
Economic & Planning Systems, Inc.

2007-2010  
Research Analyst II  
Economic & Planning Systems, Inc.

2005-2007  
Planner I  
Tetra Tech RMC

2004  
Infrastructure Planning Intern  
City and County of Denver

## Affiliations

American Planning Association

Urban Land Institute

## ABOUT

Matt Prosser has a broad base of experience and education in planning, urban design, and real estate with nine years of consulting experience. He has worked on several comprehensive plans, subarea plans, corridor revitalization studies, and fiscal impact analysis. He also has background knowledge of land use and entitlement planning, real estate development and finance, and Geographic Information Systems (GIS).

## SELECTED PROJECT EXPERIENCE

### **Comprehensive Plan Initial Studies , San Antonio, TX**

Analyzed the land capacity for infill and redevelopment within the City and its planning area. Completed a market demand analysis to determine where growth pressures are greatest for infill and policy changes needed to facilitate development. Completed fiscal impact analysis of development typologies to guide growth policy.

### **Adams County Comprehensive Plan, CO**

Provided demographic, market demand and economic development inputs for the comprehensive plan update. Completed fiscal impact analysis of land use scenarios and identified tools to offset negative fiscal impacts.

### **Denver Retail Plan, Denver, CO**

Developed a citywide retail strategy to guide economic development policies and actions. City retail sales data and national case studies were used to identify the City's retail strengths and weaknesses and identify retail policies and incentives the City should use.

### **Oklahoma City Retail Plan, Oklahoma City, OK**

Developed a citywide retail plan as part of the City's comprehensive plan effort. Developed set of policies for each retail typology and location in the City.

### **Rapid City Comprehensive Plan, SD**

Determine market demand for a variety of land use types to provide input into the future land use decision. Developed a comprehensive toolbox of public financing and affordable housing tools for the City to consider. A strategic action plan was created to implement plan policies.

### **I-25 Corridor Subarea Economic Study, Centennial, CO**

Determined the market demand for a variety of uses in the I-25 corridor subarea in Centennial. Market demand analysis was used to develop a land use plan for the Subarea. Created implementation to achieve land use plan.

### **Midtown Corridor Redevelopment Study, Fort Collins, CO**

Analyzed the demand and feasibility for the redevelopment or repositioning a declining regional mall and several commercial parcels along the main corridor of Fort Collins. Demand and feasibility for retail, residential and office uses was analyzed. Study findings were used to create a redevelopment strategy for the City's key commercial projects.



---

# Tim Morzel

Associate

---



## Education

Masters of City & Regional Planning, Cornell University, 2013

B.A., University of Colorado, 2009

## Employment History

2013-present  
Associate, Economic & Planning Systems, Inc.

2011-2013  
Research and Teaching Assistant, Cornell University

Summer 2013  
Transportation Planning Intern, Charlier Associates

Summer 2012  
Planning Intern, RRC Associates

## Affiliations

Urban Land Institute

## ABOUT

Timothy Morzel is an Associate with EPS with a broad base of experience and education in land use economics, planning, and real estate development. He holds a Master's Degree in Urban and Regional Planning from Cornell University and a Bachelor of Arts in Economics from the University of Colorado. He has a diverse skill set for solving complex problems related to land use economic issues, conducting real estate market analysis, building financial and economic modelling tools, and assessing regional economic conditions and trends.

## SELECTED PROJECT EXPERIENCE

### **Seven Trails and Hartland Fiscal Impact Studies, Douglas, WY**

Developed a fiscal impact model that measures the effect of residential and commercial development on the City's General Fund and major departments. In addition to forecasting municipal revenues and service costs, the model accounts for Wyoming's complex sales tax distribution structure and projects future revenues that will be available to the City as a result of additional commercial development.

### **Tree Farm Market and Fiscal Impact Study, El Jebel, CO**

Evaluated the feasibility of the Tree Farm project in El Jebel and developed a fiscal impact model to estimate the project's projected impacts on Eagle County revenues and other major taxing districts. The analysis included a summary of current market conditions in El Jebel and the surrounding area, which includes the Town of Basalt, Carbondale, and Glenwood Springs.

### **University of Colorado Redevelopment Plan, Boulder, CO**

Advised the University on ways to redevelop 52 acres of campus area. Focused on developing a complex time series financial model that tested the feasibility of a wide range of development scenarios. The model incorporated the use of VBA Macros in order to run a variety of development scenarios efficiently and was eventually delivered to the client for their use in scenario planning.

### **E-470 and Northwest Parkway Traffic & Revenue Study, Denver Metro, CO**

Evaluated land use demand and development potentials for the metro area. Developed a complex population and employment forecast model that calibrated geo specific level population, household, and employment forecasts for the metro area. Produced probability-based sensitivity forecasts.

### **VIA Metropolitan Transit Authority, San Antonio, TX**

Represented transit agency in negotiations with developers seeking to build on land acquired by VIA for TOD projects. Evaluated pro forma. Assessed degree of risk. Recommended partnerships in which returns were reasonable and VIA's interests were advanced. In addition, developed a property inventory model that incorporated inputs from the client and generated a series of standardized tables and charts for the client's final use in internal reports and memorandums.

# Jay Renkens, AICP

PROJECT MANAGER

---

## AREAS OF EXPERTISE

Campus Planning / Urban Development  
Downtown and Corridor Revitalization  
Urban Design / Facilitation Graphics

## QUALIFICATIONS

Jay Renkens is a seasoned project manager with a wide range of experience in planning, policy, and design. At MIG, Mr. Renkens specializes in campus planning, urban development, downtown and corridor revitalization, urban design, facilitation graphics, and multi-dimensional urban planning. His rich design and mapping portfolio is complemented by his varied experiences in verbal and written presentation. He has extensive experience writing plans, reports, grants, memos, and policies.

Mr. Renkens has completed a variety of planning and design projects. He has extensive experience assembling and leading highly effective multi-disciplinary teams that often include economists, engineers, architects, and branding specialists. He strives to ensure every project he contributes to is context-driven, community-building, and set for implementation.

## REGISTRATIONS

- American Institute of Certified Planners

## EDUCATION

- Masters of Urban and Regional Planning, Portland State University
- Master of Psychology of Health and Exercise, Purdue University
- Bachelor of Science, Health Promotion and Wellness, University of Wisconsin, Stevens Point

## RELEVANT EXPERIENCE

- Peoria Station Catalytic Site Project, *Denver, Colorado*
- Denver Downtown Area Plan, *Denver, Colorado*
- Ankeny/Burnside Development Framework, *Portland, Oregon*
- Coeur d'Alene Education Corridor Master Plan, *Coeur d'Alene, Idaho*
- West Broadway Corridor Charrette and Community Vision Plan, *Missoula, Montana*
- Spokane Downtown Master Plan Update, *Spokane, Washington*
- White Rock Center Master Plan/Economic Development Strategy, *White Rock, New Mexico*
- North Las Vegas Downtown Master Plan/Investment Strategy, *North Las Vegas, Nevada*
- Astor East Urban Renewal Plan Update, *Astoria, Oregon*
- Youngs Bay Landing Master Plan, *Astoria, Oregon*
- Boston Downtown Crossing Plan, *Boston, Massachusetts*
- Santa Rosa Bicycle and Pedestrian Master Plan, *Santa Rosa, California*
- Cheekeye Fan Master Plan, *Squamish, British Columbia, Canada*
- University of Wyoming Long Range Development Plan, *Laramie, Wyoming*
- Riverpoint Campus Master Plan, *Spokane, Washington*



# Chase Mullen

URBAN DESIGNER / 3D VISUALIZATION SPECIALIST

---

## AREAS OF EXPERTISE

Urban Planning / Digital Design Charrette  
3D Visualization

## QUALIFICATIONS

Chase Mullen has created a position unique to MIG and integral to the field of design. Having an acute eye for graphic design and interactivity, he has a distinctive methodology for 3D visualization and a fine-tuned ability to mold GIS, CAD, and 3D data seamlessly into models.

Mr. Mullen's primary role has been to lead and expand the 3D visualization branch. In his effort to build up the firm's capabilities, he has developed software, methods, and tools that are innovative and sophisticated. MIG's goals of **"decisions support the design"** and "public facilitation" are echoed in all of his projects and visualizations.

Mr. Mullen has created "Vizhen" a custom software package that allows users to walk, run, drive, and fly anywhere, look at anything, and interact with the 3D model in any way they choose. Secondly, the "Digital Design Charrette" method was created in concert with MIG Principal, Jeff Winston, to be an **interactive design facilitation tool allowing participants to verbalize their design concepts and watch them take shape immediately** within the charrette, leading to more informed and stronger project understanding.

## EDUCATION

- Bachelor of Environmental Design and Planning  
University of Colorado, Boulder

## RELEVANT EXPERIENCE

- Highway 42 Underpass and Urban Design, *Louisville, Colorado*
- Kigali, Rwanda City Planning, *Kigali, Rwanda*
- Carson City Downtown Plan, *Carson City, Nevada*
- Federal Boulevard Public Facilitation, *Jefferson County, Colorado*
- Lakewood RTD FasTracks / Lightrail TOD Center Visualizations, *Lakewood, Colorado*
- Boulder Transit Village (Phase 1), *Boulder, Colorado*
- Steamboat Springs Downtown and Base Area 3D Model, *Steamboat Springs, Colorado*
- Summit at Brian Head, *Brian Head, Utah*
- Solaris Hotel (@ Crossroads Vail), *Vail, Colorado*
- Arrabelle Hotel (Lionshead Core Building), *Vail, Colorado*
- Boulder Municipal Building Landscape Design, *Boulder, Colorado*

SPONSORED BY: MAYOR DOWNING

COUNCILMAN'S RESOLUTION

RESOLUTION NO.

No. CR-121  
Series of 2014

\_\_\_\_\_  
Series of 2014

A RESOLUTION APPROVING A PROFESSIONAL SERVICES AGREEMENT BETWEEN THE CITY OF NORTHGLENN AND ECONOMIC PLANNING SYSTEMS, INC. FOR THE CITYWIDE SUSTAINABILITY ASSESSMENT

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF NORTHGLENN, COLORADO, THAT:

Section 1. The Professional Services Agreement between the City of Northglenn and Economic Planning Systems, Inc., attached hereto, in an amount not to exceed \$170,120.00, for the Citywide Sustainability Assessment is hereby approved and the Mayor is authorized to execute same on behalf of the City of Northglenn.

DATED at Northglenn, Colorado, this \_\_\_\_ day of \_\_\_\_\_, 2014.

\_\_\_\_\_  
JOYCE DOWNING  
Mayor

ATTEST:

\_\_\_\_\_  
JOHANNA SMALL, CMC  
City Clerk

APPROVED AS TO FORM:

\_\_\_\_\_  
COREY Y. HOFFMANN  
City Attorney

**AGREEMENT FOR PROFESSIONAL SERVICES**

THIS AGREEMENT is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between the City of Northglenn, State of Colorado (hereinafter referred to as the "City") and Economic Planning Systems, Inc. (hereinafter referred to as "Consultant").

**RECITALS:**

A. The City requires professional services.

B. Consultant has held itself out to the City as having the requisite expertise and experience to perform the required work for the Project.

NOW, THEREFORE, it is hereby agreed for the consideration hereinafter set forth, that Consultant shall provide to the City, professional consulting services for the Project.

**I. SCOPE OF SERVICES**

Consultant shall furnish all labor and materials to perform the work and services required for the complete and prompt execution and performance of all duties, obligations, and responsibilities for the Project which are described or reasonably implied from **Exhibit A** which is attached hereto and incorporated herein by this reference.

**II. THE CITY'S OBLIGATIONS/CONFIDENTIALITY**

The City shall provide Consultant with reports and such other data as may be available to the City and reasonably required by Consultant to perform hereunder. No project information shall be disclosed by Consultant to third parties without prior written consent of the City or pursuant to a lawful court order directing such disclosure. All documents provided by the City to Consultant shall be returned to the City. Consultant is authorized by the City to retain copies of such data and materials at Consultant's expense.

**III. OWNERSHIP OF WORK PRODUCT**

The City acknowledges that the Consultant's work product is an instrument of professional service. Nevertheless, the products prepared under this Agreement shall become the property of the City upon completion of the work.

**IV. COMPENSATION**

A. In consideration for the completion of the services specified herein by Consultant, the City shall pay Consultant an amount not to exceed One-hundred-seventy-thousand, one-hundred-twenty dollars(\$170,120.00). Payment shall be made in accordance with the schedule of charges in Exhibit B which is attached hereto and incorporated herein by this reference. Invoices will be itemized and include hourly breakdown for all personnel and other charges. The maximum fee specified herein shall include all fees and expenses incurred by Consultant in performing all services hereunder.

B. Consultant may submit monthly or periodic statements requesting payment. Such request shall be based upon the amount and value of the work and services performed by Consultant under this Agreement except as otherwise supplemented or accompanied by such supporting data as may be required by the City.

1. All invoices, including Consultant's verified payment request, shall be submitted by Consultant to the City no later than the twenty-fourth (24th) day of each month for payment pursuant to the terms of this Agreement. In the event Consultant fails to submit any invoice on or before the twenty-fourth (24th) day of any given month, Consultant defers its right to payment pursuant to said late invoice until the twenty-fourth (24th) day of the following month.

2. Progress payments may be claimed on a monthly basis for reimbursable costs actually incurred to date as supported by detailed statements, including hourly breakdowns for all personnel and other charges. The amounts of all such monthly payments shall be paid within thirty (30) days after the timely receipt of invoice as provided by this Agreement.

C. The City has the right to ask for clarification on any Consultant invoice after receipt of the invoice by the City.

D. In the event payment for services rendered has not been made within forty-five (45) days from the receipt of the invoice for any uncontested billing, interest will accrue at the legal rate of interest. In the event payment has not been made within ninety (90) days from the receipt of the invoice for any uncontested billing, Consultant may, after giving seven (7) days written notice and without penalty or liability of any nature, suspend all work on all authorized services specified herein. In the event payment in full is not received within thirty (30) days of giving the seven (7) days written notice, Consultant may terminate this Agreement. Upon receipt of payment in full for services rendered, Consultant will continue with all authorized services.

E. Final payment shall be made within sixty (60) calendar days after all data and reports (which are suitable for reproduction and distribution by the City) required by this Agreement have been turned over to and approved by the City and upon receipt by the City of Consultant's certification that services required herein by Consultant have been fully completed in accordance with this Agreement and all data and reports for the Project.

## **V. COMMENCEMENT AND COMPLETION OF WORK**

Within seven (7) days of receipt from the City of a Notice to Proceed, Consultant shall commence work on all its obligations as set forth in the Scope of Services or that portion of such obligations as is specified in said Notice. Except as may be changed in writing by the City, the Project shall be complete and Consultant shall furnish the City the specified deliverables as provided in Exhibit A.

## **VI. CHANGES IN SCOPE OF SERVICES**

A change in the Scope of Services shall constitute any material change or amendment of services or work which is different from or additional to the Scope of Services specified in Section I of this Agreement. No such change, including any additional compensation, shall be effective, or paid unless authorized by written amendment executed by the City. If Consultant proceeds without such written authorization, then Consultant shall be deemed to have waived any claim for additional compensation, including a claim based on the theory of unjust enrichment, quantum merit or implied contract. Except as expressly provided herein, no agent, employee, or representative of the City shall have the authority to enter into any changes or modifications, either directly or implied by a course of action, relating to the terms and scope of this Agreement.

## **VII. PROFESSIONAL RESPONSIBILITY**

A. Consultant hereby warrants that it is qualified to assume the responsibilities and render the services described herein and has all requisite corporate authority and professional licenses in good standing, required by law.

B. The work performed by Consultant shall be in accordance with generally accepted professional practices and the level of competency presently maintained by other practicing professional firms in the same or similar type of work in the applicable community.

C. Consultant shall be responsible for the professional quality, technical accuracy, timely completion, and the coordination of all designs, drawings, specifications, reports, and other services furnished by Consultant under this Agreement. Consultant shall, without additional compensation, correct or resolve any errors or deficiencies in his designs, drawings, specifications, reports, and other services, which fall below the standard of professional practice, and reimburse the City for construction costs caused by errors and omissions which fall below the standard of professional practice.

D. Approval by the City of drawings, designs, specifications, reports, and incidental work or materials furnished hereunder shall not in any way relieve Consultant of responsibility for technical adequacy of the work. Neither the City's review, approval or acceptance of, nor payment for, any of the services shall be construed to operate as a waiver of any rights under this Agreement or of any cause of action arising out of the performance of this Agreement, and Consultant shall be and remain liable in accordance with applicable performance of any of the services furnished under this Agreement.

E. The rights and remedies of the City provided for under this Agreement are in addition to any other rights and remedies provided by law.

**VIII. ILLEGAL ALIENS**

A. Certification. By entering into this Agreement, Consultant hereby certifies that, at the time of this certification, it does not knowingly employ or contract with an illegal alien who will perform work under the Agreement and that Consultant will participate in either the E-Verify Program administered by the United States Department of Homeland Security and Social Security Administration or the Department Program administered by the Colorado Department of Labor and Employment in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the Agreement.

B. Prohibited Acts. Consultant shall not:

1. Knowingly employ or contract with an illegal alien to perform work under this Agreement; or

2. Enter into a contract with a subcontractor that fails to certify to Consultant that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this Agreement.

C. Verification.

1. Consultant has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this Agreement through participation in either the E-Verify Program or the Department Program.

2. Consultant shall not use the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this Agreement is being performed.

3. If Consultant obtains actual knowledge that a subcontractor performing work under this Agreement knowingly employs or contracts with an illegal alien who is performing work under the Agreement, Consultant shall:

a. Notify the subcontractor and the City within three (3) days that Consultant has actual knowledge that the subcontractor is employing or contracting with an illegal alien who is performing work under the Agreement; and

b. Terminate the subcontract with the subcontractor if within three (3) days of receiving the notice required pursuant to subparagraph (a) hereof, the subcontractor does not stop

employing or contracting with the illegal alien who is performing work under the Agreement; except that Consultant shall not terminate the contract with the subcontractor if during such three (3) days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien who is performing work under the Agreement.

D. **Duty to Comply with Investigations.** Consultant shall comply with any reasonable request by the Colorado Department of Labor and Employment made in the course of an investigation conducted pursuant to C.R.S. § 8-17.5-102(5)(a) to ensure that Consultant is complying with the terms of this Agreement.

E. If Consultant does not currently employ any employees, Consultant shall sign the NO Employee Affidavit attached hereto.

F. If Consultant wishes to verify the lawful presence of newly hired employees who perform work under the Agreement via the Department Program, Consultant shall sign the Department Program Affidavit attached hereto.

## **IX. INDEMNIFICATION**

A. **INDEMNIFICATION – GENERAL:** The City cannot and by this Agreement does not agree to indemnify, hold harmless, exonerate or assume the defense of the Consultant or any other person or entity whatsoever, for any purpose whatsoever. Provided that the claims, demands, suits, actions or proceedings of any kind are not the result of professional negligence, the Consultant, to the fullest extent permitted by law, shall defend, indemnify and hold harmless the City, its Council members, officials, officers, directors, agents and employees from any and all claims, demands, suits, actions or proceedings of any kind or nature whatsoever, including worker's compensation claims, in any way resulting from or arising from the services rendered by Consultant, its employees, agents or subconsultants, or others for whom the Consultant is legally liable, under this Agreement; provided, however, that the Consultant need not indemnify or save harmless the City, its Council members, its officers, agents and employees from damages resulting from the negligence of the Council members, officials, officers, directors, agents and employees.

B. **INDEMNIFICATION FOR PROFESSIONAL NEGLIGENCE:** The Consultant shall, to the fullest extent permitted by law, defend, indemnify and hold harmless the City, its Council members, and any of its officials, officers, directors, and employees from and against damages, liability, losses, costs and expenses, including reasonable attorneys fees, but only to the extent caused by or arising out of the negligent acts, errors or omissions of the Consultant, its employees, agents or subconsultants, or others for whom the Consultant is legally liable, in the performance of professional services under this Agreement. The Consultant is not obligated under this subparagraph IX.B. to indemnify the City for the negligent acts of the City, its Council members, or any of its officials, officers, directors, agents and employees.

C. **INDEMNIFICATION – COSTS:** Consultant shall, to the fullest extent permitted by law, defend, investigate, handle, respond to, and provide defense for and defend against, any such liability, claims or demands at the sole expense of Consultant or, at the option of the City, agrees to pay the City or reimburse the City for the defense costs incurred by the City in connection with any such liability, claims or demands. Consultant shall, to the fullest extent permitted by law, defend and bear all other costs and expenses related thereto, including court costs and attorney fees, whether or not any such liability, claims or demands alleged are groundless, false or fraudulent. If it is determined by the final judgment of a court of any competent jurisdiction that such injury, loss or damage was caused in whole or in part by the act, omission or other fault of the City, its Council members, officials, officers, directors, agents and employees, the City shall reimburse Consultant for the portion of the judgment attributable to such act, omission or other fault of the City, its Council members, officials, officers, directors, agents and employees.

**X. INSURANCE**

A. Consultant agrees to procure and maintain, at its own cost, a policy or policies of insurance sufficient to insure against all liability, claims, demands, and other obligations assumed by Consultant pursuant to Section IX, above. Such insurance shall be in addition to any other insurance requirements imposed by this Agreement or by law. Consultant shall not be relieved of any liability, claims, demands, or other obligations assumed pursuant to Section IX, above, by reason of its failure to procure or maintain insurance, or by reason of its failure to procure or maintain insurance in sufficient amounts, durations, or types.

B. Consultant shall procure and maintain, and shall cause any subcontractor of Consultant to procure and maintain, the minimum insurance coverages listed below. Such coverages shall be procured and maintained with forms and insurers acceptable to the City. All coverages shall be continuously maintained to cover all liability, claims, demands, and other obligations assumed by Consultant pursuant to Section IX, above. In the case of any claims-made policy, the necessary retroactive dates and extended reporting periods shall be procured to maintain such continuous coverage.

1. Workmen's compensation insurance to cover obligations imposed by applicable laws for any employee engaged in the performance of work under this Agreement, and Employer's Liability insurance with minimum limits of five hundred thousand dollars (\$500,000) each accident, one million dollars (\$1,000,000) disease - policy limit, and one million dollars (\$1,000,000) disease - each employee. Evidence of qualified self-insured status may be substituted for the workmen's compensation requirements of this paragraph.

2. Commercial general liability insurance with minimum combined single limits of one million dollars (\$1,000,000) each occurrence and two million dollars (\$2,000,000) general aggregate. The policy shall be applicable to all premises and operations. The policy shall include coverage for bodily injury, broad form property damage (including completed operations), personal injury (including coverage for contractual and employee acts), blanket contractual, products, and completed operations. The policy shall contain a severability of interests provision.

3. Professional liability insurance with minimum limits of six hundred thousand dollars (\$600,000) each claim and one million dollars (\$1,000,000) general aggregate.

C. The policy required by paragraph 2. above shall be endorsed to include the City and the City's officers, employees, and consultants as additional insureds. Every policy required above shall be primary insurance, and any insurance carried by the City, its officers, its employees, or its consultants shall be excess and not contributory insurance to that provided by Consultant. No additional insured endorsement to the policy required by paragraph 1. above shall contain any exclusion for bodily injury or property damage arising from completed operations. Consultant shall be solely responsible for any deductible losses under any policy required above.

D. The certificate of insurance provided for the City shall be completed by Consultant's insurance agent as evidence that policies providing the required coverages, conditions, and minimum limits are in full force and effect, and shall be reviewed and approved by the City prior to commencement of the Agreement. No other form of certificate shall be used. If the City is named as an additional insured on any policy which does not allow for the automatic addition of additional insureds, the Consultant's insurance agent shall also provide a copy of all accompanying endorsements recognizing the City as an additional insured. The certificate shall identify this Agreement and shall provide that the coverages afforded under the policies shall not be cancelled, terminated or materially changed until at least thirty (30) days prior written notice has been given to the City. The completed certificate of insurance shall be sent to:

City of Northglenn  
 Attn: Brook Svoboda, Director Planning & Deelopment  
 11701 Community Center Drive  
 Northglenn, Colorado 80233-8061

E. Failure on the part of Consultant to procure or maintain policies providing the required coverages, conditions, and minimum limits shall constitute a material breach of agreement upon which the City may immediately terminate this Agreement, or at its discretion, the City may procure or renew any such policy or any extended reporting period thereto and may pay any and all premiums in connection therewith, and all monies so paid by the City shall be repaid by Consultant to the City upon demand, or the City may offset the cost of the premiums against any monies due to Consultant from the City.

F. The City reserves the right to request and receive a certified copy of any policy and any endorsement thereto.

G. The parties hereto understand and agree that the City, its officers, and its employees, are relying on, and do not waive or intend to waive by any provision of this Agreement, the monetary limitations (presently three hundred fifty thousand dollars (\$350,000) per person and nine hundred ninety thousand dollars (\$990,000) per occurrence) or any other rights, immunities, and protections provided by the Colorado Governmental Immunity Act, Colo. Rev. Stat., §§ 24-10-101, et seq., as from time to time amended, or otherwise available to the City, its officers, or its employees.

#### **XI. NON-ASSIGNABILITY**

Neither this Agreement, nor any of the rights or obligations of the parties hereto, shall be assigned by either party without the written consent of the other.

#### **XII. TERMINATION**

This Agreement shall terminate at such time as the work in Section I is completed and the requirements of this Agreement are satisfied, or upon the City's providing Consultant with seven (7) days advance written notice, whichever occurs first. In the event the Agreement is terminated by the City's issuance of said written notice of intent to terminate, the City shall pay Consultant for all work previously authorized and completed prior to the date of termination. If, however, Consultant has substantially or materially breached the standards and terms of this Agreement, the City shall have any remedy or right of set-off available at law and equity. If the Agreement is terminated for any reason other than cause prior to completion of the Project, any use of documents by the City thereafter shall be at the City's sole risk, unless otherwise consented to by Consultant.

#### **XIII. CONFLICT OF INTEREST**

The Consultant shall disclose any personal or private interest related to property or business within the City. Upon disclosure of any such personal or private interest, the City shall determine if the interest constitutes a conflict of interest. If the City determines that a conflict of interest exists, the City may treat such conflict of interest as a default and terminate this Agreement.

#### **XIV. VENUE**

This Agreement shall be governed by the laws of the State of Colorado, and any legal action concerning the provisions hereof shall be brought in the County of Adams, State of Colorado.

#### **XV. INDEPENDENT CONTRACTOR**

Consultant is an independent contractor. Notwithstanding any provision appearing in this Agreement, all personnel assigned by Consultant to perform work under the terms of this Agreement shall be, and remain at all times, employees or agents of Consultant for all purposes. Consultant shall make no representation that it is the employee of the City for any purposes.

**XVI. NO WAIVER**

Delays in enforcement or the waiver of any one or more defaults or breaches of this Agreement by the City shall not constitute a waiver of any of the other terms or obligation of this Agreement.

**XVII. ENTIRE AGREEMENT**

This Agreement and the attached Exhibits A and B is the entire Agreement between Consultant and the City, superseding all prior oral or written communications. None of the provisions of this Agreement may be amended, modified, or changed, except as specified herein.

**XVIII. SUBJECT TO ANNUAL APPROPRIATION**

Consistent with Article X, Section 20 of the Colorado Constitution, any financial obligations of the City not to be performed during the current fiscal year are subject to annual appropriation, and thus any obligations of the City hereunder shall extend only to monies currently appropriated.

**XIX. NOTICE**

Any notice or communication between Consultant and the City which may be required, or which may be given, under the terms of this Agreement shall be in writing, and shall be deemed to have been sufficiently given when directly presented or sent pre-paid, first class United States Mail, addressed as follows:

The City:           City of Northglenn  
                          11701 Community Center Drive  
                          Northglenn, Colorado 80233-8061

Consultant:       Economic Planning Systems, Inc.  
                          730 17th St, Suite 630  
                          Denver, CO 80202

IN WITNESS WHEREOF, the parties hereto each herewith subscribe the same in duplicate.

**CITY OF NORTHGLENN, COLORADO**

By: \_\_\_\_\_

Joyce Downing  
Print Name

Mayor  
Title \_\_\_\_\_ Date

ATTEST:

\_\_\_\_\_  
Johanna Small, CMC Date  
City Clerk

APPROVED AS TO FORM:

\_\_\_\_\_  
Corey Y. Hoffmann Date  
City Attorney

**CONSULTANT:**

By: Andrew M Kundtzen

Andrew M. Kundtzen  
Print Name

Managing Principal 1/19/14  
Title Date

ATTEST:

By: Helena Soister  
Helena Soister  
Print Name

Office Manager 1/19/14  
Title Date

City's Project Manager

\_\_\_\_\_



## *SCOPE OF WORK*

---

### **A. Introduction/Executive Summary**

#### **Project Team Overview**

The Economic & Planning Systems team includes EPS and MIG. EPS will lead the project and provide the technical work products related to fiscal modeling, LOS projections, market positioning, and site rankings. MIG has a depth of experience with urban design and planning, site planning, stakeholder engagement and will illustrate the land use concepts on different sites to show what future growth could look like under different assumptions.

Both MIG and EPS have conducted numerous projects that have heavy engagement pieces. Both are well experienced with elected and appointed boards and how to structure a process that is effective and helps communities move forward. We understand that the City Council and NURA Board seek a consulting team that is both technically informative as well as collaborative and brings the various perspectives of the boards together.

Andrew Knudtsen, Managing Principal with EPS, will lead the project. Jay Renkens, Principal and Director of Denver Area Operations with MIG, will take an active role in the engagement and visualization components. Other staff include Matt Prosser and Tim Morzel from EPS who will be project analysts. Dan Guimond, Principal, will act as a Senior Advisor providing insight from his 40 years of consulting experience. Mr. Renkens will be supported by 3D visualization specialist Chase Mullen from MIG.

#### **Team Expertise**

- **Engagement** – We have worked with elected and appointed boards and understand how to build capacity incrementally. Although fiscal models are technically complex, we convey the depth of the analysis through a step-by step process and in a way that enables board members to grasp the implications and make decisions. We are collaborative. We are low-ego. We motivate elected officials to move into the subject matter and become experts in their own right.
- **Fiscal** – We have constructed numerous fiscal models and understand how to capture the relevant City data and organize it into a model that can be used to test future development scenarios. We excel at integrating ‘dials’ into our models that enable our clients to perform sensitivity tests on future work, such that the material generated as part of this project lives on well after it has concluded. This is another example of how we help build capacity.
- **Market** – The EPS Team understands market performance and how to gauge market depth over time. Few firms have the technical expertise and ability to understand demand for retail, residential, or industrial land uses. Placing Northglenn within the Northern I-25 context as well as the Denver Metro context will enable decision makers to understand the viability of options and move forward in synch with the market.
- **Feasibility** – In most cases, the City and NURA will rely on private sector developers to implement future projects. Accordingly, there must be sufficient profit margin to motivate their activity. What is an appropriate return-on-investment? Should the City and/or NURA invest with land or public financing revenue streams and to what degree? Should the City lease or sell its real estate? How should the City structure a public-private partnership (PPP)? EPS has advised many cities on ways to engage the private sector and can draw from that experience to help Northglenn understand how to prioritize their options.
- **Visual Depictions** – Many elected and appointed boards will ‘know it when they see it.’ For example, they can give policy direction when they see development assumptions for use, parking,

setbacks, height, density, etc. illustrated. MIG has a depth of expertise and insight for planning and urban design issues and a breadth of visualization tools that can convey how a given site will look under different development scenarios.

## Project Approach

EPS and MIG see this project primarily as a tool that will enable the City Council and NURA to develop unified direction for the future of Northglenn. We believe that the findings from the technical analysis, presented incrementally and collaboratively to the elected and appointed officials, will provide a foundation from which the Council and NURA can come to agreement on a common, well-coordinated direction and set policy accordingly. Operating in a vacuum yields no progress. However, with the right information, the City can make decisions and move forward.

In terms of stakeholder engagement, we believe frequent and well-crafted face-to-face interactions will provide the City Council and NURA with the technical expertise to interpret the technical findings and set policy. We have found that presenting and layering findings incrementally works. People gain insight, and more importantly, trust. As you will see in the proposal that follows, EPS and MIG recommend monthly combined work sessions with both bodies. We think that council/board members will want to have the information flow be consistently open to each member, thereby engendering collaboration throughout the process.

In terms of technical analysis, EPS and MIG have worked together on similar projects. We are highly familiar with the tasks that follow and will build on our past experiences to ensure that this process is efficient and effective. We will direct our efforts with the following goals in mind:

- **Prioritization** – The deliverables will work to differentiate the opportunities for development/redevelopment and thus enable the City to direct its resources accordingly.
- **Fiscal Sustainability relative to LOS** – The comprehensive fiscal model will show how different land use scenarios (including the existing “as is” status) perform over time and what steps the City can take to solidify its base and become fiscally sustainable.
- **Enduring Tools** – EPS and MIG will provide tools that span staff and elected official tenure. The land use portfolio, visualizations and the fiscal model will be built to be transferred to staff (complete with training sessions) to ensure the value created by this project benefits the City in years to come.
- **ROI** – EPS will maintain its focus on helping the City find ways to generate returns on its investments, including financial returns as well as those pertaining to quality of life.

## City Council and NURA Engagement

As stated previously, EPS and MIG have extensive experience working closely with elected and appointed officials to create decision making tools, development strategy and overall consensus. Our approach to working with the Northglenn City Council and NURA Board is informed by this experience and designed to walk both bodies through the process in a very deliberate and stepwise fashion. The major aspects of our engagement process include:

- **Educate and Inform** – The process of meeting with the council and board on a regular basis from the very beginning of the process will allow us to establish a common foundation from which the remainder of the process and decision making will be based. Officials have varying levels of experience and knowledge when it comes to development, design and implementation strategies. We will take an academy approach – using Northglenn data and findings – to educate the participants prior to the need for decisions.

- **Provide Material to Chew On** – Most elected and appointed officials prefer to respond to something rather than approach something with a blank slate. Our team will provide materials for the council and board members to mull over and respond to in bite size pieces.
- **Tell a Story** – EPS and MIG have teamed on many projects and know the importance of process continuity. In addition to pacing the process with plenty of touches with the decision makers, the team will work to build an overall dialogue that will help staff and officials tell the story of the typologies, development strategies and priorities. We propose to crystallize this by providing one or two poster boards at each meeting that can be a semi-permanent and sequential fixture in the council chambers or another meeting space.
- **Illustrate concepts and tradeoffs** – MIG provides a range of tools to help visualize development concepts, the relationships with existing development and the various physical implications of potential typologies and development projects.

### Value added to Draft Scope

As the selection panel will see, much of the proposed scope of work is the material generated by staff and shown in the RFP. The value that has been interjected into the tasks includes:

- **Market Analysis** – EPS believes that the method to prioritize opportunities will be that much easier with a backdrop of market assessment.
- **Feasibility Analysis** – Roles for the City to catalyze development can be identified more clearly with a pro forma feasibility analysis of different opportunities. Accordingly, scope language has been added.
- **Linked models that inform decisions** – the Fiscal model will be linked to the results of the market findings, making it that much more grounded in the Northglenn context. The models will be constructed with numerous ‘dials’ that will enable a range of alternatives to be evaluated.
- **Deliverable Specificity** – Many of the ‘Questions’ included by staff have been used to frame and specify the deliverables that EPS and MIG will provide.
- **Staff Training** – EPS proposes to include a Staff Training task, to enable staff to use *and update* the material. The goal is to ensure that the products provided by this project outlast the tenure of both elected officials as well as staff members, providing an asset to the City that helps guide decisions well into the future.

## B. Proposal

As the Northglenn selection team can see, EPS has used virtually all of the scope narrative prepared by staff. We believe it is a solid methodology for addressing the issues. Accordingly, we have modified slightly to make it actionable, including deliverables.

### Task 1: Decision Maker Communication and Engagement

Communication to and engagement of the decision makers is an integral part of the successful delivery of the results of the economic sustainability exercise. To that end, a robust strategy of preface education, policy impact discussion, and facilitated decision support is the foundation upon which this proposal is built. The EPS-MIG team will lead the City’s decision makers through exercises that include the establishment of a baseline understanding of the fundamentals of local government land use and finance as well as the impact of the spectrum of policy decisions bear various future results.

The EPS-MIG team proposes to meet with the City Council and NURA jointly approximately twice monthly, every other month (see schedule for details). from December 2014 through October 2015.

At a few critical points of the process, we suggest inserting additional meetings to maintain momentum. The EPS-MIG Team believes cities are most successful with frequent face-to-face interaction.

To begin the project, EPS and MIG will meet with staff, City Council members, and NURA in December of 2014, committed a full day to conduct a series of interviews with the elected and appointed officials. During these meetings, EPS and MIG will establish the framework for the project and will illicit comments from the elected and appointed officials as to the problems they would like to solve. EPS and MIG will address the point listed below, and from that discussion, facilitate the dialogue to identify the issues that warrant solutions. Based on numerous experiences with other sets of elected officials, once they galvanize around a set of problem definitions, they will move towards solutions. To facilitate this discussion, EPS and MIG will prepare background information on the following topics:

- Overview of market dynamics and Northglenn's general market position;
- The basics of land use economics, including a discussion regarding existing (and planned) citywide land uses, land use trends in the regional and national markets, and employment market areas of opportunity;
- Discussion of general economic development theories regarding basic/non-basic employment, the effects of multipliers and spin-offs, and the City's regional competitiveness;
- Discussion regarding future level of service provision, the cost to provide service, how a city functions (generally) and how it pays for services.

(Please note that there will be ample opportunity for input from stakeholders in Tasks 2, 3, 4, and 5 of the more detailed issues identified by staff in the RFP.)

#### **Task 1 Deliverables**

- Worksession with Staff to review work program and proposed process, and prepare for initial work session with Council/NURA.
- Background material to inform the Council/NURA discussion.
- A full day of interviews with elected and appointed officials.
- 
- Definition of problem statement(s) and revisions to proposed process (if any) to guide balance of project following Council/NURA interviews
- Review of existing internal systems, using the billing process and requested level of detail to limit scope and budget creep.

#### **Task 2: Inventory and Assessment**

EPS-MIG will provide a comprehensive real estate portfolio for the City of Northglenn. This information will be provided as an Excel database with instructions to staff on ways to maintain it in the future. Generally, the inventory will include a wide range of factors used to gauge suitability of development and will generally be categorized into Supply Factors and Demand Factors. These will then be used to assess the City's competitive position in the market and how it can work with the market to prioritize its opportunities.

**A.** The **Supply Factors** will include information such as:

- Assessed and market values;
- Deed restrictions, if any;
- Infrastructure readiness / availability;
- Current land use and zoning;
- Adjacent uses;
- Maps, graphics, and photographs;
- Square Footage;
- Impediments (flood plan, topography, etc.);

**B. FAR projections by type of use.** The ***Demand Factors*** will address:

- Trends in retail, industrial, office, and multifamily markets;
- Current rents for each use, shown in context of trends dating back to the Great Recession;
- Vacancy rates by use, current and historic data similar to the rental data;
- Production data, showing permit activity as well as expansion/contraction in inventory by use;
- For retail uses, EPS will provide a particularly detailed evaluation of the Northglenn market that quantifies the depth of support. EPS will quantify the expenditure potential and document the current retail flows, identifying the degree of retail sales leakage by major story category. The information will provide a basis for understanding how to stem the flow of leakage and what is realistic.

**C. Competitive Position** – EPS will evaluate the City's retail competitive position within the Northern I-25 Corridor as well as the Denver-metro region. The Competitive Analysis will provide a detailed inventory of Northglenn's retail operations relative to the presence of other retailers in the Northern I-25 corridor. The analysis will address the strengths and weaknesses of the Northglenn market and what factors are within the purview of the City to change to impact its competitive position.

For the office and industrial segments of the market, EPS will provide a similar evaluation of the Northglenn market, recognizing the low vacancy rates for these uses reflect the strength of the market. The goal is to use the competitive analysis to illuminate Council perspective's on the demand for future development within Northglenn, how the City can capitalize on its strength, mitigate any weak positions it holds, and maximize future opportunity. EPS will interview selected property owners and land owners to capture their understanding of market opportunities and existing impediments to ensure the consultant analysis syncs with local insight.

***Task 2 Deliverables***

- A portfolio of property-specific data with instructions and sources for staff to use to maintain in the future. This portfolio will be provided as an excel data base and will document the inventory of vacant, underutilized, and developable land, both City-owned and privately held.
- A market assessment report that will provide detailed evaluation of market Demand and Supply factors affecting development and redevelopment potential, with an evaluation of Northglenn's market position
- Summary of interviews with land owners and local developers.
- A list of preliminary recommendations that identify optimal land uses, zoning, and suitability for potential project ideas. These will be general in nature, and will be vetted in greater detail in the following tasks.
- MIG will provide visualizations of for three to five of the preliminary recommendations, covering different uses (retail, industrial, office, mixed use) on different sites.
- A set of FAR take-off's for these parcels that can be inserted into the fiscal model constructed in Task 3 that will provide revenues, expenditures, and net values to the City in terms of the full range of potential tax sources as well as service demands.
- Identification of impediments to development, identify those that are market based, property based, or community based. Examples include appropriate zoning, infrastructure, visibility, accessibility, proximity and conditions of surrounding properties, etc.
- EPS will provide a staff training session for ways to keep the portfolio up to date, as well as the market supply and demand factors.

***Stakeholder Engagement:*** EPS recommends two work sessions with Council/NURA, the first addressing supply and demand factors. The second will address the competitive position of the City

and implications on build out of the remaining development opportunities in the City. The second will include visualization by MIG of different development scenarios.

### **Task 3: Economic Sustainability Analysis**

EPS will construct a Fiscal Model for the City of Northglenn that accounts for the full range of expenditures required to serve residents and employees. The model will also account for all revenues derived by the City from taxes, fees, and other sources. This model will be constructed with a number of 'dials' that will enable the consultant team (and staff in the future) to test fiscal sustainability of the City under a range of different buildout scenarios. The current Level of Service (LOS) will be quantified by service area (or department), with the ability to test scenarios for higher or lower LOS in the future.

- A. Current Fiscal Performance** – EPS will load the model to show the current Land Use Yield Analysis. The analysis will depict the current revenue yield of all revenue streams (sales tax, property tax, use tax, fees, and other sources) by land use types throughout the City. EPS will utilize data available through city records and the City's existing tax structure, relying on the City's current budget and calibrated based on interviews with the City's Finance Director as well as one-on-one interviews with City department heads. The analysis will summarize and depict the average expected revenue per unit of measure and compare yields of both existing land use forms existing in Northglenn as well as estimates for land uses currently not present or underrepresented in the city (vertical mixed use, office mixed use etc.).

The output from the analysis of the current fiscal performance will show the land use yield on a per unit basis (acres, land square foot, building square foot, etc.) and will compare all land uses based on the numeric outputs and well as charts and graphs. Staff and elected officials will be able to quickly and easily understand how retail, for example, compares to other uses in terms of fiscal yield.

- B. Future Fiscal Performance** – EPS will conduct an analysis of future revenues generated by prospective development, using the buildout assumptions developed in Task 2. Current LOS will be assumed for the future, but can be modified to show impacts to fiscal balance. EPS and MIG will build on the City's desire for alternative land use configurations, the creation of a "sense of place", and a thorough examination of the existing fiscal policy, and will examine the long term economic sustainability of the current configuration and provide recommendations regarding strategies (both fiscal and land use regulatory) that will bring about change to the community and demonstrate a sustainable economic future.

The results of this analysis will get at the crux of the study – what scenarios are sustainable? The comparisons will address the existing land uses and future development potential under different scenarios. It is recommended to focus the analysis (and the corresponding discussion with City Council and NURA) for this step to a discussion of the future sustainability given the current composition of the city. The steps below, regarding future buildout, warrant separate analyses and Council presentations. The findings from this step will address the key question addressing the current mix of land use relative to the current fiscal policy and if they can provide sustainable revenues to support future LOS demands.

- C. Policy Discussion on Fiscal Sustainability** – The consultant shall examine the City's current tax and fee structure to determine if any imbalance exists and corrective changes would be suggested now or at a future date. The Consultant will examine the City's internal tax and fee structure, within the context of the City Charter and applicable Colorado State Statutes. Additionally, the Consultant will examine opportunities for alternative fees and/or taxes to aid in the optimization of revenue within the context of anticipated future land uses, the City's Urban Renewal Authority,

**D. *Alternative Scenario Analysis*** – EPS and MIG will provide no less than three different scenarios using the agreed upon “areas of change” and will identify the impacts to the overall economic sustainability and character of the City. Note that EPS and MIG are prepared to provide multiple scenarios mapping out the future, not just three. We recommend a consultant team-staff team workshop in which multiple ‘what if’s’ are tested and that we collaboratively identify three to five scenarios to forward to Council and NURA for discussion in that forum. If deemed appropriate, we would suggest utilizing MIG’s 3D digital design charrette as a tool in this work session, whereby designers are at the controls of a 3D representation of select opportunity sites, staff have laser pointers to help guide the “pen”, and staff and consultants work together to build the basis for scenarios and typologies in real time. The current working assumption will be a set of outputs based on the four scenarios shown below.

The outputs from the scenarios will identify:

- Costs to incentivize development or jointly develop certain properties;
- Additional LOS costs incurred by the new development;
- Total revenues anticipated for each scenario, depicted at 5-year increments over 20 years;
- Suggested changes in fiscal policies; and
- The exercise of land use authority and other policies required of the City.

The scenarios to be tested include:

- Comprehensive Plan – A rendering of the yield based on the updated Comp. Plan.
- Optimized Opportunities – A rendering of yield from a land use pattern optimized for rev.
- Community Character – A rendering of yield from a land use pattern optimized for “sense of place” and community character
- Tax/Fees Scenario – A rendering of a likely, market based land use scenario with adjustments made to fiscal policy based on the Fiscal Policy Discussion above.

EPS will develop a set of evaluation criteria to enable City Council and NURA to differentiate the results of these tests. The metrics will address the question, “What alternative scenarios are possible given market support, fiscal performance, long-term sustainability, development impediments, etc.?” The analysis will also include a section stipulating changes to City policy required of each.

**E. *Intangible Benefits*** – EPS and MIG will conduct research and show case studies of communities that have generated intangible benefits from progressive approaches to land use, infill, and urban design. This analysis will address the value of community character, sense of place, public health, etc. The Consultant will lead a discussion with Council and NURA regarding the economic benefits that correlate to the above listed attributes.

### ***Task 3 Deliverables***

- Fiscal model that accounts for all revenues and expenditures for the city that can be loaded with existing and future land use alternatives.
- Summary of current fiscal performance of existing land use pattern.
- Definition and evaluation of different build out scenarios and the implications on fiscal balance and LOS.
- Formal report that captures the methodology, findings, and summary of outputs and scenarios.
- Recommendations regarding fiscal policy and how to structure revenue streams to enable the City to achieve a sustainable future.
- Staff training session on how to load the fiscal model, perform sensitivity analyses, and interpret results.

**Stakeholder Engagement:** We recommend two sessions with Council/NURA on the results from A and B. The first would be an introduction of the methodology and purpose. The second would be a review of the findings from both steps.

We recommend two to three sessions with Council/NURA on Steps C and D. The findings will be dense and will require ample opportunity for discussion to digest the information and begin the process of defining a direction for the City.

As requested in the RFP, EPS can lead a discussion with Council/NURA on the findings from Step E.

#### **Task 4: Prioritization and Readiness**

**A. Site Prioritization** – EPS will integrate findings from the previous tasks and will develop criteria to prioritize the readiness and appropriateness of priority parcels or areas for investment. This ‘readiness’ test or prioritization will establish a categorization or tiered timeline for selected areas in the City. EPS will lead decision makers through an exercise that narrows the priorities for development and City investment within the context of limited resources. EPS will work with City staff to vet potential criteria and will then establish then to identify actions for the City in terms of properties to be sold, leased, held (for near- mid- and long-term periods), as well as those which represent opportunities for Public-Private-Partnerships (PPP). Potential criteria might include: impact to long-term fiscal sustainability, location, size of the parcel or building, proximity to infrastructure, market trends, and stakeholder input. The output will show which parcels/areas are most “ready” for investment, the expected benefits, and the impact to the City’s fiscal balance.

**B. Catalytic Roles** – EPS will explore Alternative Development Potentials and will identify ways the City can catalyze the Northglenn market. EPS will vet all the sites and areas and identify optimal opportunities for public-private partnerships where City property and/or funds could be contributed to leverage a priority project. We will draw from the previous market assessment to show how the market factors affect feasibility. Finally, EPS will develop recommendations for an incentive policy and application process, as well as identify of current opportunities the City might consider pursuing proactively.

One of the key factors in determining the role of the City in a PPP is a detailed pro forma model to identify the sources and uses of funds, the returns to the various members of the partnership, the waterfall of proceeds, and the way the risk and return are commensurate by participation. EPS will construct a feasibility model for the highest opportunity site and provide the parameters for City participation. EPS will draw from its depth of experience with pro forma construction and understanding of measures of return to enable the City to be proactive and at the same time, approach partnerships with the sophistication required to team with developers.

**C. Site Specific Ranking and Summary of Findings** – EPS will summarize the findings with different products to convey the material to a range of audiences. It will show all the properties in the portfolio, discuss their attributes and challenges, identify implications of land use decisions, and show the resulting prioritization of opportunity. The materials will synthesize the recommendations from the visioning process and identify an implementation plan and approach.

For City held properties, information will be provided that explains the timeline and recommendations, how the parcels should be marketed and to whom, and whether the City should develop any new programs to achieve goals, such as an innovative website application, etc. Additionally, sites that may be more appropriate for the City to conduct a Request for Proposal should also be identified.

**Task 4 Deliverables:**

- A summary linking City goals and how each City-owned site can contribute to them.
- A discussion of options for sell, lease, joint venture, and PPP for City assets, as well as ways the City can partner with private sector developers.
- A set of Policies and Procedures for selecting projects for PPP and for entertaining proposals from the private sector (for profit or nonprofit) to use City land or utilize City/NURA financial resources.

**Stakeholder Engagement:** EPS recommends one work session to review the findings from Task 4.

**Task 5: Strategy for Next Steps**

EPS-MIG will provide a comprehensive report with chapters on each of the tasks in this project. It will summarize the findings, analysis, and input collected above with recommendations that address the following:

- a) Determine approach for limited financial resources to invest in prioritized properties
- b) Identify Comp Plan/Council Vision consistency – determine need for updating
- c) Develop program for Council to understand and address fiscal policy impacts on level of service both near and long term
- d) Provide fiscal time series depiction for prioritization projects and overall city monitoring levels

**Project Management and Scheduling Expertise**

EPS employs a number of techniques to assure project quality and conformance with schedule and budget:

- Weekly project review and update meetings with the Principal-in-Charge and Project Manager.
- Progress reports provided to client with monthly invoices including identification of any project schedule or budget issues needing to be resolved.
- Proposed contract budget has a not to exceed total without prior client approval.

**C. Schedule**

The project will begin in December 2014 and will be completed by October 2015. As part of the initial effort with staff, EPS-MIG would review options for the schedule, seeking input regarding the appetite for Council/NURA work sessions and how to tailor the recommended set of meetings to best use elected/appointed official time.

# citywide sustainability assessment



		TASK 1 Project Initiation	TASK 2 Inventory and Assessment	TASK 3 Economic Sustainability Analysis	TASK 4 Prioritization and Readiness	TASK 5 Strategy for Next Steps					
MEETINGS	INFORM	Project Initiation Meeting 	Ongoing Staff Work Sessions 	JCN Meeting #3 JCN Meeting #5	JCN Meeting #7 JCN Meeting #9 <b>Optional:</b> Staff Workshop						
	ENGAGE	Interviews 	Joint Council/NURA (JCN) Meeting #1 	JCN Meeting #4 JCN Meeting #6	JCN Meeting #8 JCN Meeting #10						
DELIVERABLES			Competitive Position Analysis 	Fiscal Sustainability 	Visualizations and Alternatives Analysis 	Prioritization and Potential Partnerships 	Next Steps 				
			Typologies 	Fiscal Options 	Fiscal Direction 	Goals and Roles 	Implementation Plan 				
		2014	2015					2015			
		DEC	JAN	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT

# EXHIBIT B

Table 1  
Proposed Project Budget

	Economic & Planning Systems					MIG Total	Total Budget
	Principal in Charge (Knuuttsen)	Senior Associate (Prosser)	Associate (Morzel)	Production/ Research	EPS Total		
<b>Billing Rate</b>	\$220	\$145	\$120	\$90			
<b>Labor Costs</b>							
<b>Task 1: Decision Maker Communication and Engagement</b>	40	40	40	16	\$20,840	\$15,000	\$35,840
<b>Task 2: Inventory and Assessment</b>	16	32	40	56	\$18,000	\$0	\$18,000
Task 2.A: Supply Factors	4	8	16	24	\$6,120	\$0	\$6,120
Task 2.B: Demand Factors	4	8	16	24	\$6,120	\$0	\$6,120
Task 2.C: Competitive Position	8	16	8	8	\$5,760	\$0	\$5,760
<b>Task 3: Economic Sustainability Analysis</b>	64	80	104	40	\$41,760	\$20,000	\$61,760
Task 3.A: Current Fiscal Performance	8	16	40	24	\$11,040	\$0	\$11,040
Task 3.B: Future Fiscal Performance	8	16	24	8	\$7,680	\$0	\$7,680
Task 3.C: Policy Discussion on Fiscal Sustainability	24	16	16	0	\$9,520	\$2,000	\$11,520
Task 3.D: Alternative Scenario Analysis	16	16	16	8	\$8,480	\$10,000	\$18,480
Task 3.E: Intangible Benefits	8	16	8	0	\$5,040	\$8,000	\$13,040
<b>Task 4: Prioritization and Readiness</b>	32	64	56	16	\$24,480	\$10,000	\$34,480
Task 4.A: Site Prioritization	8	24	24	8	\$8,840	\$2,000	\$10,840
Task 4.B: Catalytic Roles	8	16	16	8	\$6,720	\$4,000	\$10,720
Task 4.C: Site Specific Rankings and Summary of Findings	16	24	16	0	\$8,920	\$4,000	\$12,920
<b>Task 5: Strategy for Next Steps</b>	24	32	8	24	\$13,040	\$5,000	\$18,040
<b>Subtotal - Labor</b>	176	248	248	152	\$118,120	\$50,000	\$168,120
<b>Direct Costs</b>							
Co-Star Data					\$1,000	\$0	\$1,000
Local Travel and Misc. Direct Costs					\$500	\$500	\$1,000
<b>Subtotal</b>					\$1,500	\$500	\$2,000
<b>Total</b>					\$119,620	\$50,500	\$170,120

Prepared 7/8/2014

G:\143068-Northglenn Fiscal and Market Analysis\143068-pbudget.xlsx\EPS Budget



## **2014 Hourly Staff Billing Rates**

---

Knudtsen - Managing Principal	\$220
Guimond - Principal	\$220
Duffany, Schwartz - Vice President	\$175
Prosser - Senior Associate	\$145
Ryerson, Morzel - Associate	\$120
Chung - Research Analyst II	\$90
Garvey - Research Analyst I	\$80
Production and Administrative Staff	\$80

Billing rates updated annually.

**PROSPECTIVE CONSULTANT'S CERTIFICATE REGARDING EMPLOYING OR CONTRACTING WITH AN ILLEGAL ALIEN**

FROM: \_\_\_\_\_  
(Prospective *Consultant*)

TO: City of Northglenn  
PO Box 330061  
11701 Community Center Drive  
Northglenn, CO 80233

Project Name \_\_\_\_\_

Bid Number \_\_\_\_\_ Project No. \_\_\_\_\_

As a prospective Consultant for the above-identified bid, I (we) do hereby certify that, as of the date of this certification, I (we) do not knowingly employ or contract with an illegal alien who will perform work under the Agreement and that I (we) will confirm the employment eligibility of all employees who are newly hired for employment to perform work under the Agreement through participation in either the E- Verify Program administered by the United States Department of Homeland Security and Social Security Administration or the Department Program administered by the Colorado Department of Labor and Employment.

Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

Prospective Consultant \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

**NO EMPLOYEE AFFIDAVIT**

**1. Check and complete one:**

I, \_\_\_\_\_, am a sole proprietor doing business as \_\_\_\_\_ . I do not currently employ any individuals. Should I employ any individuals during the term of my Agreement with the City, I certify that I will comply with the lawful presence verification requirements outlined in that Agreement.

**OR**

I, \_\_\_\_\_, am an owner/member/shareholder of \_\_\_\_\_, a \_\_\_\_\_ [specify type of entity-i.e, corporation, limited liability company], that does not currently employ any individuals. Should I employ any individuals during the term of my Agreement with the City, I certify that I will comply with the lawful presence verification requirements outlined in that Agreement.

**2. Check one.**

I, \_\_\_\_\_, am a United States citizen or legal permanent resident.

*The City must verify this statement by reviewing one of the following items:*

- o A valid Colorado Driver's license or a Colorado identification card*
- o A United States military card or a military dependent's identification card*
- o A United States Coast Guard Merchant Mariner card*
- o A Native American tribal document or*
- o In the case of a resident of another state, the driver's license or state-issued identification card from the state of residence, if that state requires the applicant to prove lawful presence prior to the issuance of the identification card*
- o Any other documents or combination of documents listed in the City's "Acceptable Documents for Lawful Presence Verification" chart that prove both the consultant's citizenship/lawful presence and identity.*

**OR**

I am otherwise lawfully present in the United States pursuant to federal law.

*Consultant must verify this statement through the federal systematic alien verification of entitlement program, the "SAVE" program, and provide such verification to the City.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**ACCEPTABLE DOCUMENTS FOR  
LAWFUL PRESENCE VERIFICATION for  
the NO EMPLOYEE AFFIDAVIT**

**Documents that Serve to Prove Citizenship/Lawful Presence and Identification:**

- Colorado Driver's License or Identification Card
- Out of State drivers license from: AL, AZ, AR, CA, CT, DE, DC, FL, GA, ID, IN, IA, KS, KY, LA, ME, MN, MS, MO, MT, NV, NH, NJ, NY, ND, OH, OK, PA, RI, SC, SD, VA, WV, WY
- A United States Military Card of a Military Dependent's Identification Card
- A United States Coast Guard or Merchant Mariner Card
- A Native American Tribal Document
- Certificate of Naturalization with Photograph
- Certificate of U.S. Citizenship with Photograph
- U.S. Passport (less than 5 years old)
- Northern Mariana Identification Card with Photograph

**OR**

**Documents that Only Serve to Prove Citizenship/Lawful Presence:**

- U.S. Birth Certificate
- Certification of Report of Birth from Department of State
- Report of Birth Abroad of a U.S. Citizen
- U.S. Citizen Identification Card
- Final Adoption Decree
- Evidence of U.S. Civil Service Employment before June 1, 1976
- Statement Provided by U.S. Consular Officer Certifying Citizenship
- Religious Records Recorded in the 50 states, D.C., or a U.S. Territory Showing Birth Date or Child's Age and Location of Birth in U.S.
- Early School Records
- Census Records
- Other Documents that Establish a U.S. Place of Birth or in Some Way Indicates U.S. Citizenship

**AND**

**Documents that Serve to Prove Identification:**

- A Driver's License or Identification Card Regardless of the State of Issuance
- School Identification Card with Photograph
- Identification Card Issued by Federal, State or Local Government
- A Driver's License Issued by a Canadian Government Authority



For the DEPARTMENT PROGRAM AFFIDAVIT

**LISTS OF ACCEPTABLE DOCUMENTS**

<b>LIST A</b> Documents that Establish Both Identity and Employment Eligibility	<b>OR</b>	<b>LIST B</b> Documents that Establish Identity	<b>AND</b>	<b>LIST C</b> Documents that Establish Employment Eligibility
1. U.S. Passport (unexpired or expired)		1. Driver's license or ID card issued by a state or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address		1. U.S. Social Security card issued by the Social Security Administration <i>(other than a card stating it is not valid for employment)</i>
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)		2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address		2. Certification of Birth Abroad issued by the Department of State <i>(Form FS-545 or Form DS-1350)</i>
3. An unexpired foreign passport with a temporary I-551 stamp		3. School ID card with a photograph		3. Original or certified copy of a birth certificate issued by a state, county, municipal authority or outlying possession of the United States bearing an official seal
4. An unexpired Employment Authorization Document that contains a photograph (Form I-766, I-688, I-688A, I-688B)		4. Voter's registration card		4. Native American tribal document
		5. U.S. Military card or draft record		5. U.S. Citizen ID Card <i>(Form I-197)</i>
5. An unexpired foreign passport with an unexpired Arrival-Departure Record, Form I-94, bearing the same name as the passport and containing an endorsement of the alien's nonimmigrant status, if that status authorizes the alien to work for the employer		6. Military dependent's ID card		6. ID Card for use of Resident Citizen in the United States <i>(Form I-179)</i>
		7. U.S. Coast Guard Merchant Mariner Card		
		8. Native American tribal document		7. Unexpired employment authorization document issued by DHS <i>(other than those listed under List A)</i>
	9. Driver's license issued by a Canadian government authority			
		<b>For persons under age 18 who are unable to present a document listed above:</b>		
		10. School record or report card		
		11. Clinic, doctor or hospital record		
		12. Day-care or nursery school record		

**Illustrations of many of these documents appear in Part 8 of the Handbook for Employers (M-274)**