

# TOWN OF FRISCO

## REQUEST FOR PROPOSALS HOUSING NEEDS ASSESSMENT & STRATEGIC HOUSING ACTION PLAN



## PROPOSAL OF SERVICES

PRESENTED BY



Dynamic  
Planning +  
Science



Triple Point  
Strategic  
Consulting



Castlewood  
Capital



Western  
Spaces

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**LETTER OF PROPOSAL AND COMMITMENT**

**November 29<sup>th</sup>, 2023**

**James Gorham**

Town of Frisco, Colorado  
1 Main Street  
PO Box  
Frisco, CO 80443

**Re: Proposal Submission for Housing Needs Assessment and Strategic Housing Action Plan**

Dear James Gorham,

Dynamic Planning + Science (DP+S), in partnership with Triple Point Consulting, Western Spaces, and Castlewood Capital, is beyond excited to submit this proposal for and to collaborate with the Town of Frisco in developing a comprehensive housing plan that will address the current and future needs of the community.

With our deep-rooted expertise in housing, economics, finance, and community engagement, and with our successful track record in delivering similar projects in Colorado and beyond, we are confident in our ability to provide the Town of Frisco with insightful and actionable solutions.

Our approach to this project will be grounded in a thorough analysis of the town’s demographic, economic, and housing data, coupled with robust community engagement to ensure that our recommendations are both data-driven and reflective of the community’s needs and aspirations. We are particularly excited about the possibility of contributing to the town’s vision for a vibrant, inclusive, and sustainable housing future.

We have thoroughly reviewed and understand the provisions of the RFP issued by the Town of Frisco. We are fully committed to adhering to the guidelines and requirements set forth in the RFP and are prepared to dedicate our key staff, resources, and expertise to the successful completion of this project.

Should DP+S be selected for this project, we are committed to supplying the key staff members and subconsultants identified in this proposal for the duration of the project to ensure continuity and the high-level expertise demonstrated herein. Our team will be led by Ethan Mobley, Project Manager, and supported by DP+S staff members Brian Greer, GIS Manager/Owner; Raini Ott, Senior Planner; and Alex Krebs, Data Analyst. Resumes for each team member with DP+S as well as subconsultant team members are provided in Appendix A. Staff Resumes.

**Ethan Mobley**

OWNER, AICP

**Dynamic Planning + Science**

**Colorado Office**

19235 HWY 550  
Montrose CO, 81403

**Tax ID Number: 47-2973423**

[www.dynamicplanning.co](http://www.dynamicplanning.co)

## Town of Frisco

Housing Needs Assessment and Strategic Housing Action Plan

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Enclosed with this letter, you will find our detailed proposal, which includes our project understanding, proposed methodology, project team, and timeline. We are looking forward to the opportunity to discuss our proposal in further detail.

Thank you for considering our submission. We are enthusiastic about the prospect of working with the Town of Frisco and contributing to the wellbeing and sustainability of the community.

If you have any questions, please do not hesitate to call me at 970-323-4331 or email me at [ethan@dynamicplanning.co](mailto:ethan@dynamicplanning.co).

Sincerely,



Ethan Mobley  
Planner, Owner  
Dynamic Planning + Science  
PHONE 970-323-4331  
COLORADO 19235 HWY 550 Montrose, CO 81403

***It is Dynamic Planning + Sciences' intention to adhere to the provisions described in this RFP and we are committed to entering a binding contract with the Town of Frisco. We have reviewed all attachments and addendums and see nothing that would prevent our company from successfully executing a contract with the County. The contents of this RFP including budget will remain valid for 90 days.***

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### QUALIFICATIONS

DP+S has assembled a team of housing planning practitioners, including Triple Point Strategic Consulting, Western Spaces, and Castlewood Capital, to provide comprehensive consultant services. These subconsultants offer expertise in housing economics, market studies, housing strategies, and financial modeling. DP+S and its team members are based in mountain towns in Colorado and have a deep understanding of the local context. They are dedicated to addressing the housing crisis and fostering holistic, diverse housing in communities like yours.

### TEAM DESCRIPTION



Dynamic Planning, LLC, doing business as **“Dynamic Planning + Science,”** is a registered small business in Montrose, CO. Founded in 2015, we are a small, specialized consulting firm that provides public and private entities with comprehensive community planning and data visualization services. The Dynamic Planning + Science (DP+S) team possesses years of ‘rubber meets the road’ experience having led jurisdictions through community planning efforts, including comprehensive plans, housing data analysis and plans, hazard mitigation plans, and development review support.

Our team has managed close to 70 planning projects and processes on various subjects by providing on-site process facilitation, stakeholder outreach and engagement, data collection and analysis, plan writing, and strategy development. From data analysis and reporting to comprehensive planning efforts, we consistently collect and visualize data to support high quality planning products and reports. We know how to tell compelling stories through our work and have numerous project examples that contain relevant housing planning work. Check out our example work in this section of the response, and on the proposal website [here](#)<sup>1</sup>.

Recognizing that successful planning efforts must be a team endeavor, and no one consultant has the answer, we have assembled a team of housing planning practitioners to deliver the necessary consultant services on this project. Our team members recognize that the current housing crisis greatly impacts the lives of those who live, work, and have the potential to own or rent property in your community. We will not pretend to solve the crisis on our own, but we can slowly chip away at the impediments through plans, studies and data analysis, relationships, and hard work as a team. Our “Consultant Team” includes Triple Point Strategic Consulting, Western Spaces, and Castlewood Capital. We are excited for you to read on! Most importantly, we understand mountain towns as most of our team members live, work, and play in the beautiful mountains of Colorado including your backyard. Project team resumes can be found in Appendix A. Staff Resumes.

### SUBCONSULTANTS



Triple Point Strategic Consulting offers solutions to complex challenges such as housing economics, renewable energy, and estimating future outcomes from sparse data. The owner, Jeffrey Moffett, Ph.D., has 30 years of experience working in the fields of business development, economic forecasting, destination marketing, resource allocation, and political strategy. In 2013, Jeff founded Triple Point Strategic Consulting to provide data-driven marketing, strategic

<sup>1</sup> <http://dynamicplanning.co/frisco/>

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planning, and business analysis in a variety of sectors throughout the Western U.S. and Canada. Triple Point is frequently retained to develop economic forecasts and financial models.



Western Spaces offers a comprehensive range of services to address your housing and planning needs on this project. From in-depth market studies and needs assessments to the precise development and implementation of housing strategies, they have you covered. Their expertise extends to comprehensive planning, parks and recreation planning, economic development strategies, and community surveys.

Sarah Brown McClain is the founder of Western Spaces, LLC. With a passion for economic development, environmental preservation and workforce housing, Sarah is committed to crafting holistic, diverse communities that nurture both residents and visitors. Her skill set spans housing research, urban planning, data collection, analysis, civic tech, and policy development. Over the past 17 years, Sarah has dedicated herself to housing-specific studies across the Mountain West, demonstrating her expertise in the field. Throughout her life, Sarah has been a steadfast advocate for affordable housing, community development, and environmental preservation, making her a respected leader in her field.



Castlewood Capital works with real estate developers, private landowners, cities and counties, and housing authorities to provide world-class financing and organizational development tools to projects

and communities who need it most. The owner, Michael Leahey, brings 20 years of finance, capital markets, and public sector experience to every project, from large public-private partnerships to smaller, but no less important, community development engagements, resulting in projects achieving higher returns and greater social impact.

Contact information is included for each consulting firm in the RFP are provided below for your convenience:

Name	Title / Role	City / State of Residence	Phone Number	Email Address
<b>Dynamic Planning + Science (Prime)</b>				
Ethan Mobley	Owner	Montrose, CO	970-323-4331	<a href="mailto:ethan@dynamicplanning.co">ethan@dynamicplanning.co</a>
Brian Greer	Co-Owner	Concord, CA	510-523-4331	<a href="mailto:brian@dynamicplanning.co">brian@dynamicplanning.co</a>
<b>Triple Point Strategic Consulting (Subconsultant)</b>				
Jeff Moffett	Owner	Crested Butte, CO	970-275-1906	<a href="mailto:jmoffett@tpsconsulting.net">jmoffett@tpsconsulting.net</a>
<b>Western Spaces, LLC (Subconsultant)</b>				
Sarah Brown McClain	Owner	Frisco, CO	970-275-3154	<a href="mailto:sarah@westernspaces.co">sarah@westernspaces.co</a>
<b>Castlewood Community Capital (Subconsultant)</b>				
Michael Leahey	Owner	Leadville, CO	303-720-5663	<a href="mailto:michael@castlewood-capital.com">michael@castlewood-capital.com</a>

### Principal contact person to discuss proposal:

**Name:** Ethan Mobley, Owner  
**Firm Name:** Dynamic Planning + Science  
**Mailing Address:** 19235 HWY 550, Montrose CO 81403  
**Phone:** 970-323-4331  
**Email Address:** [ethan@dynamicplanning.co](mailto:ethan@dynamicplanning.co)

### SAMPLE(S) OF COMPLETED PROJECTS

#### Region 10 (Western Slope of Colorado) Housing Analysis (Dynamic Planning + Science and Triple Point Consulting)

**Western Slope Housing Analysis:** In the spring of 2022, the Region 10 Economic Development District (Region 10) received grant funding to conduct a regional housing “meta-analysis” across the six counties it serves on Colorado’s Western Slope (Delta, Gunnison, Hinsdale, Montrose, Ouray, San Miguel). Region 10 selected Dynamic Planning + Science and Triple Point Consulting to conduct this study. While several counties and municipalities in the region have conducted independent Housing Needs Assessments in recent years, Dynamic Planning + Science’s report is unique in its attempt to synthesize workforce housing needs at the regional level and identifies financial strategy to reduce the capital gap necessary for rural development. Furthermore, recognizing Region 10’s role as a resource as an advisory body for local economic development, the scope was narrowed to workforce housing needs and solutions. The Housing Needs Assessments which have emerged from Region 10 communities in recent years provide evidence of a widespread deficit of affordable workforce housing. The Dynamic Planning + Science Team analyzed present and future county-level housing needs and strategy in the context of its highly regionalized workforce. The findings and recommendations contained in the report allowed communities in Region 10 to better understand the scale of housing need in the region and identify opportunities to support a vibrant and diverse workforce through regional workforce housing development partnerships. The scope of work included following:

- Stakeholder interviews representing diverse geographies and perspectives around the region,
- Analysis of relevant housing and demographic data for Region 10,
- Estimations of current and future unmet county-level workforce housing needs,
- Assessment of the regional economic impacts of future workforce housing development, and
- Identification of financial tools and opportunities for Region 10 to support local jurisdictions in accelerating the goals of regional workforce housing development.

#### Reference:

Michelle Haynes, Executive Director, Region 10

[mhaynes@region10.net](mailto:mhaynes@region10.net)

970-249-2436 Direct

145 S. Cascade Ave. Montrose, CO 81401

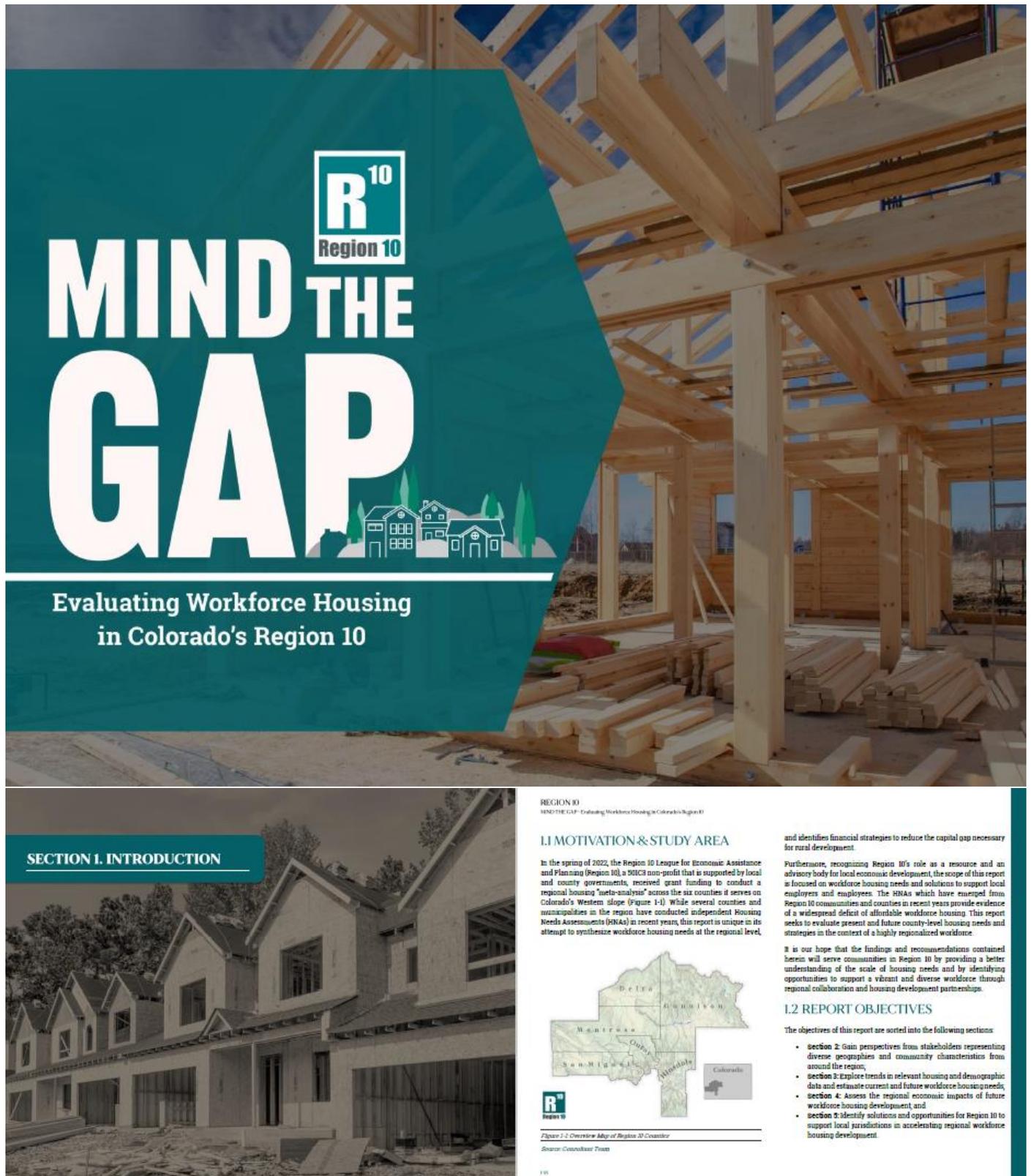


Figure 1: Example work Mind the Gap Report for Region 10

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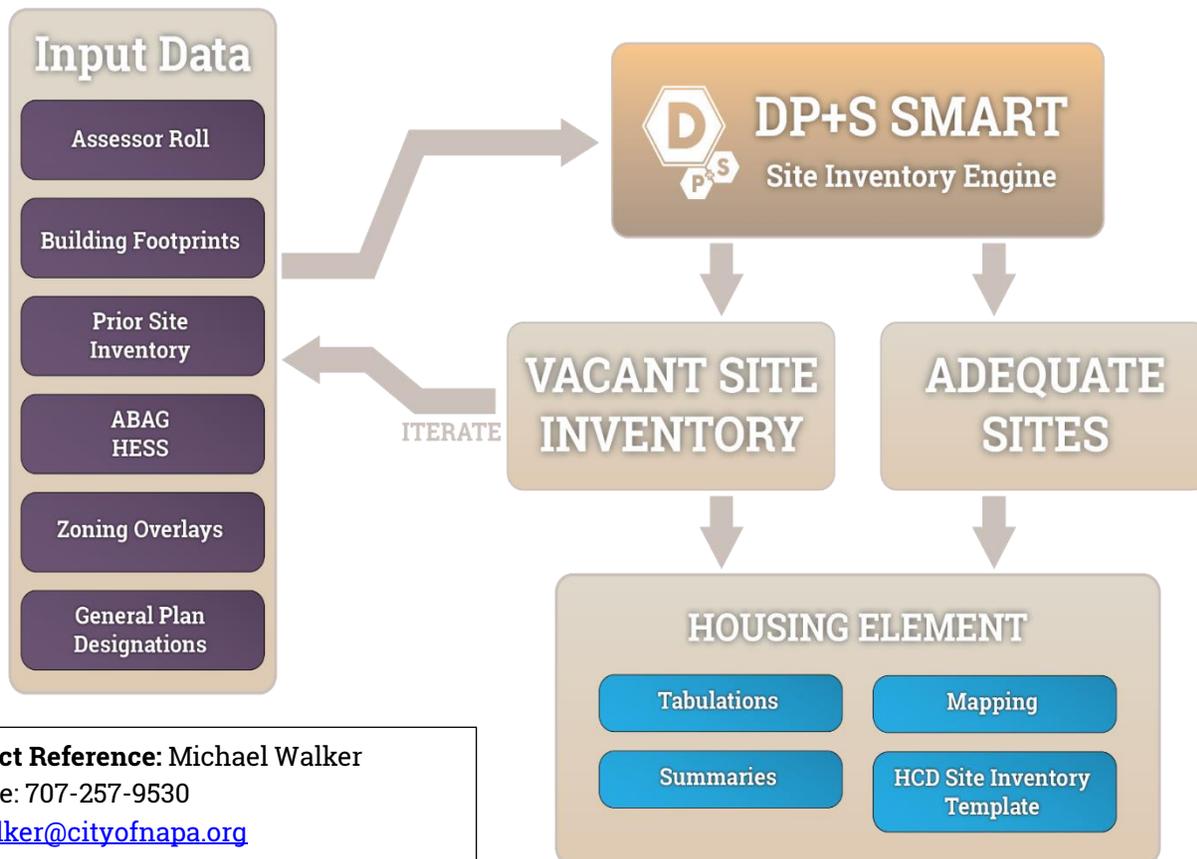
## City of Napa, CA 2023 Housing Element Update (Dynamic Planning + Science)

Dynamic Planning + Science collaborated with the City of Napa, CA on the sixth cycle of the General Plan Housing Element Update within California’s heavily regulated housing environment. This included adhering to new site inventory analysis requirements under a variety of new housing laws in California. The City adopted the Housing Element on Oct 17, 2023. Please check out our work here:

[City of Napa Housing Element Link](#)

The City of Napa’s Housing Element for 2023-2031 is designed to meet state housing requirements and community needs. It focuses on engaging the community in the housing planning process, assessing land available for housing, and setting forth clear goals and policies to address housing needs. The document emphasizes the creation of equitable, inclusive neighborhoods and diverse housing options.

Key goals include supporting a variety of housing types for all population segments, promoting diverse and equitable housing, preserving local heritage, enhancing energy conservation and infrastructure, and protecting the community from displacement. The Housing Element also recognizes limitations in staffing and budget, and highlights the importance of public participation in housing planning. The plan also features a Fair Housing Assessment, which explores regional and local fair housing issues, identifying factors that influence housing fairness and policies to address these challenges. This approach aims to ensure that Napa remains an equitable and inclusive city, providing opportunities for all residents, especially those most vulnerable. The below graphic provides a summary of our housing analysis model for housing element. We develop parcel-based inventories of housing potential based upon census data, building footprints, zoning and land use designations.



**Project Reference:** Michael Walker  
Phone: 707-257-9530  
[mwalker@cityofnapa.org](mailto:mwalker@cityofnapa.org)

Figure 2: DP+S’s SMART Site Inventory Model

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### City of Cortez Housing Action Plan 2023 (Western Spaces, LLC)

Western Spaces, LLC updated the City's Housing Policies and developed a Housing Action Plan, in conjunction with the code update and following the recent completion of the Housing Needs Assessment. This multifaceted process aimed to identify and formulate policy recommendations that effectively addressed the housing needs within the City of Cortez, recognizing the importance of collective efforts in community building. The Action Plan encompassed not only city-led initiatives but also established partnerships and actionable steps for organizations and various community stakeholders. These collaborative measures contribute to improving the availability and affordability of local housing, fostering a stronger and more inclusive community.

**Project / Client Reference:** Rachael Marchbanks, Community and Economic Development Director

Phone: 970-564-4046

[rmarchbanks@cortezco.gov](mailto:rmarchbanks@cortezco.gov)

### City of Cortez Housing Needs Assessment 2023 (Triple Point Consulting)

In the wake of the pandemic, Cortez rental rates skyrocketed. The cost of two-bedroom units increased 50 percent within a just a few years. As a result of this and other factors, the City commissioned a clear, comprehensive, and well documented Housing Needs Assessment that is well documented. Triple Point joined a team of experts to source a diverse range of data from historical rental classifieds from the state library to the University of Washington's Self-Sufficiency Standard to model the effects of the changing housing market on the socioeconomic conditions of the community. The report also forecasts housing needs out 5 years and provides tactical recommendations to inform the development of a subsequent strategic housing plan.

<https://www.cortezco.gov/860/Housing-Needs-Assessment>

**Project / Client Reference:** Rachael Marchbanks, Community and Economic Development Director

Phone: 970-564-4046

[rmarchbanks@cortezco.gov](mailto:rmarchbanks@cortezco.gov)

### Summit County School District Housing Needs Assessment 2023 (Western Spaces, LLC)

Western Spaces completed a Housing Needs Assessment to support the Summit School District (SSD) in gaining a deeper understanding of how local housing prices and limited availability impact its recruitment and retention of qualified staff, as well as the ability of employees to find satisfactory housing in the community. The study included an extensive household survey which received a 66% response rate. The project provided guidance toward effective policies for SSD to consider and developed guiding principles and goals toward addressing housing needs among staff. Public outreach was conducted at several community meetings and the school district board is working toward adopting a housing strategy as part of the larger facilities master plan process.

**Project / Client Reference:** Kara Drake, Chief Financial Officer

[kara.drake@summitk12.org](mailto:kara.drake@summitk12.org)

970-368-1008

# CORTEZ HOUSING POLICY UPDATE

## VIRTUAL HOUSING COMMITTEE WORK SESSIONS AND PUBLIC OUTREACH

### Agenda

<b>2:00 - 2:15</b>	Welcome and Purpose (10 minutes)
<b>2:15 - 2:20</b>	Existing Goals and Objectives (30 minutes)
<b>2:20 – 3:00</b>	Income Targeting and Pricing (20 minutes)
<b>3:00 – 3:20</b>	Number of Units to be Developed (20 minutes)
<b>3:20 – 3:30</b>	Wrap up/Next Steps (10 minutes)

### Process Schedule

Housing Committee Meeting #1	Goals and Objectives	May 22nd
Housing Committee Meeting #2	Prioritize Policies/Tools	June 7 <sup>th</sup> (?)
Public Open House	Feedback on Policy Priorities and Goals	June 12th
Joint Council and P&Z Worksession	Feedback on Policy Priorities and Goals	June 13th
Housing Committee Meeting #3	Finalize Action Plan	TBD
Presentation to P&Z	Final Action Plan for Review and Adoption	TBD
Presentation to Council	Final Action Plan for Review and Adoption	TBD

### Goal: Number of Units

Question to Consider:

- ▶ Is a numerical target helpful to track progress/ensure local housing development? If yes, what is a realistic goal?

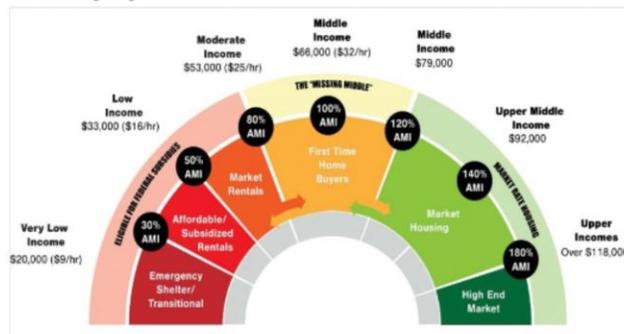
Cortez Housing Needs, 2023-2028

	Where live	Where work
Catch-Up	136	233
Pending development adjustment	(59)	(59)
<b>Total Catch-up Housing Units</b>	<b>75</b>	<b>175</b>
New jobs (0.78% avg. growth/year)	140	240
Retiring employees (3% of jobs)	70	120
<b>Total Keep-up Housing Units</b>	<b>210</b>	<b>360</b>
<b>Catch-up and Keep-up through 2028</b>	<b>285</b>	<b>535</b>

SOURCE: CONSULTANT TEAM

### Goal: Income Targeting and Pricing

Cortez Housing Bridge



Income examples are for 2-person household; incomes have been rounded  
Source: CHFA Income Limits 2022, Consultant Team

## Cortez Housing Policy Open Houses

Join us to learn about the Housing Policy Update Process and Provide Feedback.

- Identifying and prioritizing specific community housing needs;
- Setting goals and objectives to target needs;
- Exploring various available tools to address identified housing needs;

*Creating a Balanced Approach to Community Housing*

**JUNE 12TH**  
12-2 PM

**Cortez Chamber**  
20 W Main St.

**JUNE 13TH**  
3-5 PM

**City Hall**  
123 E. Roger Smith Ave.

For more information:  
marchbanks@cortezco.gov  
970-564-4068

### METHODOLOGY AND APPROACH

As part of our methodology and approach response, we have provided a comprehensive description of proven methods and carrying out the project scope as detailed in the RFP. Our common philosophical approach to this project can be considered distributive justice. When applied to this housing scope of work, distributive justice is concerned with ensuring that access to housing is distributed in a fair and equitable manner, and that housing policies and practices do not result in unjust disparities or inequalities within Frisco housing market.

Town Council, Planning Commission, Stakeholders and our collective team adopting this approach would aim to reduce disparities in income, access to services such as housing, water for such, and other social goods, ensuring that the benefits and burdens of housing are distributed equitably across your community. Here are some key aspects of distributive justice concepts that you will see throughout our proposal:

**Equity in Housing Access:** Distributive justice in housing means that everyone within a community should have an equal opportunity to access safe, decent, and affordable housing. This includes considerations of race, ethnicity, gender, socioeconomic status, disability, and other factors to prevent discrimination and ensure that historically disadvantaged groups have an equal chance to secure housing.

**Reducing Disparities:** Housing policies and practices should aim to reduce disparities in housing quality and affordability. This means addressing housing conditions that are substandard or unsafe and taking steps to bridge the gap between those who have access to high-quality housing and those who do not.

**Affordable Housing:** Distributive justice often emphasizes the need for affordable housing options, especially for low-income individuals and families. It advocates for policies and initiatives that ensure that a significant portion of the housing stock is affordable to a wide range of income levels.

**Equitable Housing Distribution:** Distributive justice also means that housing should be distributed in a way that avoids segregating communities along lines of income, race, or other characteristics. This may involve efforts to promote mixed-income neighborhoods and reduce the concentration of poverty in specific areas.

**Subsidies and Housing Programs:** Distributive justice may support government subsidies and housing programs that assist those who cannot afford market-rate housing. These programs can include housing vouchers, public housing, and supportive housing for vulnerable populations.

### PROJECT UNDERSTANDING

We understand Town of Frisco, located within Summit County, Colorado, it covers an area of 1.89 square miles and is home to approx. 3,116 year-round residents. Frisco is uniquely situated, surrounded on three sides by Federal public land and on one side by Dillon Reservoir. The town is accessible via Interstate 70, which has two exits leading into it, and Highway 9 that runs through its business district.

Tourism plays a foundational role in Frisco's economy. Due to its proximity to Denver (approximately 90 miles away) and six ski resorts, including Breckenridge and Vail, Frisco attracts over 4 million visitors per year. This influx of tourists significantly impacts the town's housing market and overall economy.

For this requested project the Town would like to:

- Build off the 2023 Summit County Housing Needs Assessment and identify additional gaps within the Town limits of Frisco. As part of this gap analysis our team shall identify needed product types for new construction or conversions and propose strategies for addressing the identified needs.
- Evaluate the goal of having 50% of the housing units in Frisco occupied by year-round residents.

## Town of Frisco

### Housing Needs Assessment and Strategic Housing Action Plan

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- Evaluate the impacts of housing production on Frisco's economy.
- Create effective policies and programs to support housing.
- And most importantly answer the question: "How do we manage and plan for the growth of Frisco?"

## GENERAL PROJECT APPROACH

From our knowledge as housing practitioners, no community has "built their way out" of a housing issue; however, there are many approaches to housing problems. You ask: "How do we manage and plan for the growth of Frisco?". Based on our experience and expertise, we recommend four tasks as outlined in our proposal. The results of our efforts will help local leaders and housing practitioners in Frisco better understand current trends and motivate and empower them to address evolving community housing needs. While the data will be gathered from multiple existing documents in a general approach, the results will provide targeted insights to Frisco's housing needs, barriers to success, and tools to address them. In Colorado, most solutions are regional, but our efforts and our team can assist your local government with tools and resources to combat this regional and national housing crisis. We have taken the liberty to re-arrange / re-order the task in the RFP to provide clarity amongst tasks and follow specific steps to reach the end state of Frisco's Strategic Housing Plan. Below is a summary of our general approach and project management methods, followed by a detailed scope of services.

## TASK 1: IDENTIFY GOALS AND OBJECTIVES

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The first crucial step involves a detailed identification of goals and objectives for Frisco's housing sector. This task will lay the groundwork for future actions and policies. The process includes engaging with the community, consulting with town staff, and conducting work sessions with the Town Council. The objectives will focus on defining the success measures for workforce housing in Frisco, which are essential for directing future housing policies and developments.

## TASK 2: FRISCO HOUSING NEEDS ASSESSMENT

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This task is pivotal in understanding the current state of housing in Frisco. It involves extrapolating data from the 2023 Summit County Housing Needs Assessment and tailoring it to Frisco's specific context. The assessment will delve into demographic trends, evaluate the existing housing stock, including types of homes, rental versus ownership, vacancies, and special housing needs. It will also analyze current housing prices and rental rates and assess how much of the housing stock is used for full-time living versus short-term rentals. A critical aspect of this task is identifying housing needs and gaps for the local workforce over the next five years and proposing solutions to address these gaps.

## TASK 3: MODELING CAPACITY, IMPACTS AND FINANCING (FORMALLY TASK 4 UNDER DIFFERENT TITLE)

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This task involves creating an interactive buildout model for Frisco, which will be a critical tool for predicting potential residential capacity growth. The model will enable the town to simulate different housing development scenarios and the community-wide ramifications of each, helping to understand and plan for future residential growth along with desired amenities and required services. Evaluating and understanding the relationship between the demand for services and the supply with this model will improve planning and community development. This task also includes financial modeling to identify capital gaps and funding sources for housing projects. Our team will provide recommendations on managing the growth of Frisco, including potential changes to zoning and enhancements to government services.

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These tasks represent a comprehensive approach to addressing Frisco's housing needs. From setting clear objectives, assessing current needs, planning strategically, to modeling future scenarios, each step is designed to create a more sustainable, inclusive, and well-planned housing landscape in Frisco, aligning with its broader community and economic goals.

## **TASK 4: FRISCO STRATEGIC HOUSING PLAN - TURNING TO ACTION (FORMALLY TASK 3)**

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The final task is to develop a comprehensive Strategic Housing Action Plan for Frisco. This plan will include a review and evaluation of existing housing programs in Frisco, such as Housing Helps, land purchases, ongoing housing projects, and various state grants and financing programs. The plan aims to integrate these programs into a formalized strategy and propose changes or additional strategies to address the identified need for workforce housing. This task will also involve public engagement to ensure community input is integrated into the plan.

### **PROJECT MANAGEMENT**

To effectively manage the project for the Housing Needs Assessment and Strategic Housing Action Plan, it's important to establish and maintain a clear project management plan. Our RFP response outlines the key tasks, milestones, resources, and timelines required to develop requested products.

The project management task includes administrative management of the project budget, schedule, and subconsultant management from project award to completion. DP+S project management tasks include project accounting, ongoing coordination & scheduling of meetings, meeting preparation, stakeholder coordination, and preparation of monthly project status reports. The DP+S team will participate in virtual and face-to-face meetings and conference calls during the work program period.

### **PROJECT REPORTING**

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Mr. Mobley (Project Manager) will prepare monthly progress reports, submitted along with payment invoices, describing work progress and percentage of budget expended by task element. Mr. Mobley will also assist the Town Staff project management team to prepare monthly progress reports and quarterly reports for grant reporting if requested.

### **FILE SHARING MAINTENANCE**

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The DP+S team will create a project portal to serve as a centralized project information and file-sharing platform. DP+S will develop a website and resource pages for file sharing and sharing of raw background data for the Town to share with other consultants in an open-source format. The project portal provides a tool for project management, collaborative content, and one-stop-shop for planning resources in an attractive and intuitive interface. For this update process, project participants and stakeholders will have centralized access to all project information from any device on this web-based portal.

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## PROJECT KICKOFF

The Consultant Team will collaborate with Town Staff to organize and facilitate an internal Kickoff Meeting to review the project scope and schedule. The Kick-off Meeting will also serve to get the project managers up to speed on current affairs and housing projects.

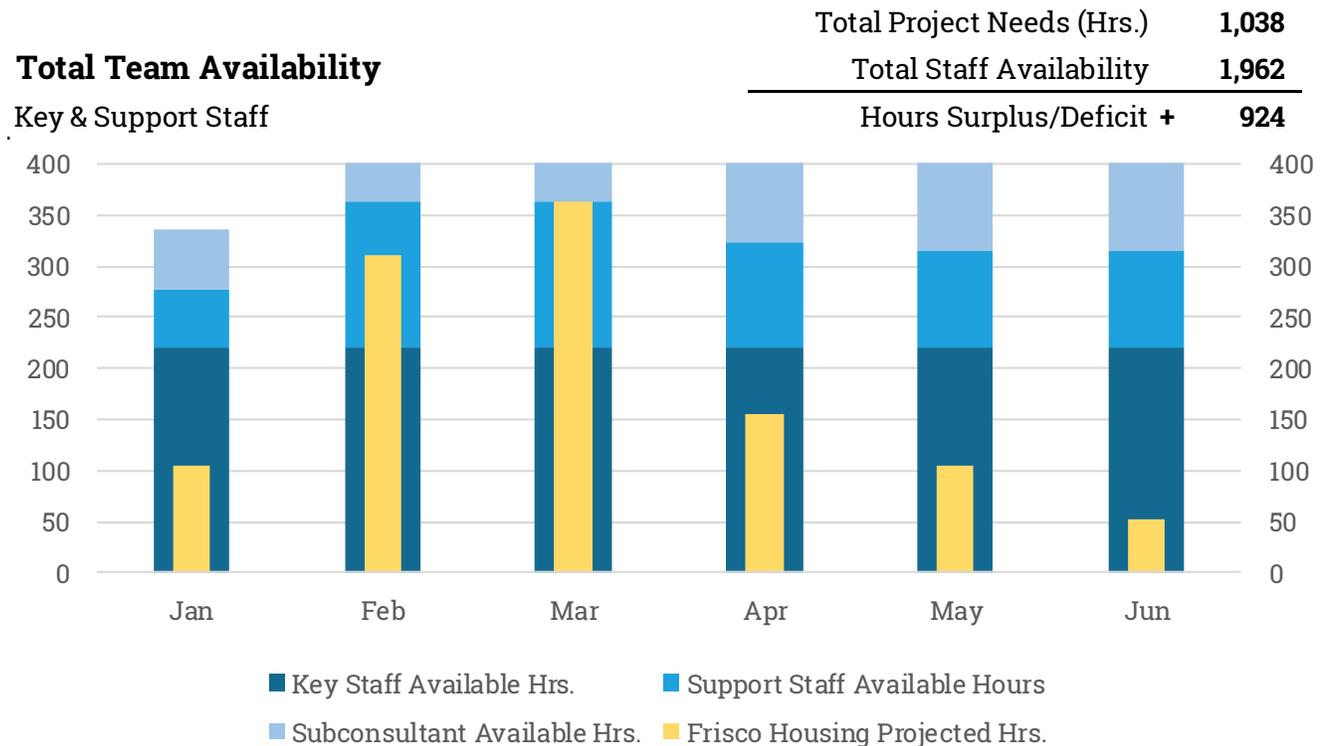
## SCHEDULE MAINTENANCE

All critical path schedules will be maintained in Microsoft Project and posted on a regular basis to the Town Staff project management team. Responsibility for planning and controlling a contract schedule belongs to the Ethan Mobley, Project Manager with DP+S, who will use the following in-place business protocols:

- Weekly workload management meetings, including long-range staffing projections
- Multi-media scheduling (word processing, graphics, editing, production scheduling)
- Timeline scheduling for tasks and milestones

## STAFFING PLAN

Based upon the scope of work in the RFP, we are assuming a six-month project period of performance. Figure 3 illustrates our staff’s available hours per month based on current and projected project workloads for Key Staff, Support Staff, and Subconsultant support. Based on hourly rates and budget, this project will demand a maximum of 360 hours of staff time per month with required staff time tapering after April. We are confident that our staff members have sufficient availability to finish the project in a timely manner with copious attention to detail based on hours assigned and current workloads.



*Figure 3: Projected Staff Availability*

### DETAILED SCOPE OF SERVICES

This detailed scope of services for the Town of Frisco's Housing Needs Assessment and Strategic Housing Action Plan is a comprehensive task oriented designed to address and strategize the future of housing in Frisco.

Our team has developed a streamlined work plan to assign resources, develop a budget and clear sequencing. Our sequenced work plan will reduce the risk of project overruns and ensure successful completion through a clear understanding of project tasks and sub-tasks for all involved.

### TASK 1: IDENTIFY GOALS AND OBJECTIVES

In tackling the complex issue of workforce housing in Frisco, a strategic and well-orchestrated approach is imperative starting with Goals and Objectives. The methods to achieve the set goals and objectives for workforce housing encompass a range of activities and initiatives, each designed to address different facets of the housing challenge. These methods are not standalone solutions; rather, they represent a synergistic effort that combines community engagement, policy innovation, and pragmatic planning. Let's explore these methods in detail, outlining how each contributes to creating a sustainable, inclusive, and accessible housing landscape for Frisco's workforce.

### STAFF INTERACTION

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Collaboration across different town departments is crucial for the effective implementation of housing strategies. This involves regular interaction and coordination between planning, development, finance, and other relevant departments. By working together, staff can ensure that housing initiatives are aligned with the town's broader goals, including economic development, environmental sustainability, and community welfare. This interdepartmental cooperation facilitates a more holistic and efficient approach to housing development, ensuring that resources are optimally utilized and that policies are implemented seamlessly.

### SUMMIT COMBINED HOUSING AUTHORITY (SCHA) COLLABORATION

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Setting goals in collaboration with the Summit Combined Housing Authority (SCHA) is a critical step for the Town of Frisco in addressing its workforce housing needs. This process involves establishing clear, achievable objectives that align with both the town's specific requirements and the broader regional housing strategy. A key aspect of goal setting with the SCHA is identifying objectives that benefit both Frisco and the wider community. This could include increasing the overall stock of affordable housing, developing mixed-use developments, or implementing new funding mechanisms for housing projects. The shared objectives should reflect a balance between addressing Frisco's specific needs and contributing to the regional housing goals.

### TOWN COUNCIL WORK SESSIONS

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Regular work sessions with the Town Council are vital for maintaining the momentum of housing initiatives. These sessions serve as platforms for reviewing progress, discussing policy changes, and allocating resources. They also provide an opportunity for council members to offer guidance, voice concerns, and contribute their expertise to the housing strategy. These meetings are instrumental in ensuring that the housing goals remain aligned with the town's overall vision and that there is continuous political support for the initiatives.

### DATA-DRIVEN DECISION MAKING

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In today's world, effective policymaking relies heavily on data and analytics. Utilizing data from housing assessments, demographic studies, and market trends from Task 2 and Task 3 below enables the town to make informed decisions. This data-driven approach helps in identifying the most pressing housing needs, predicting future trends, and measuring the impact of existing policies. It also allows for a more adaptive strategy, where policies and initiatives can be tweaked based on real-time data and changing circumstances.

### COMMUNITY HOUSING COMMITTEE

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Lastly, the foundation of any successful housing strategy lies in understanding the needs and concerns of the community it aims to serve. Engaging with residents, local businesses, and other stakeholders provides invaluable insights into the real-world implications of housing policies and developments. We suggest the formation of a Community Housing Committee. The goal is to foster a dialogue that not only informs housing stakeholders about ongoing initiatives but also actively incorporates feedback into the decision-making process.

### REGULAR REVIEW AND ADAPTATION

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The housing market is dynamic, and strategies may need to be adjusted in response to changing conditions. Regular reviews of the set goals, in collaboration with topics above, ensure that the strategies remain relevant and effective. This adaptive approach allows Frisco and SCHA to respond promptly to new challenges and opportunities.

### FOCUSING ON SUSTAINABILITY AND INCLUSIVITY

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Finally, the goals set by Frisco should emphasize sustainability and inclusivity. This means not only considering the environmental impact of housing developments but also ensuring that the housing solutions cater to a diverse range of residents, from different income levels, family sizes, and backgrounds.

In summary, goal setting with our Consultant Team presents an opportunity for Frisco to address its housing challenges in a comprehensive, strategic, and collaborative manner. By aligning local objectives with regional goals, leveraging shared resources, and engaging with the community, Frisco can take significant steps toward creating a more inclusive and sustainable housing environment.

### TIMELINE

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- Initial meetings with Staff and SCHA within the First Two Months
- Data Driven Decision Making Third Month
- Community Outreach Efforts Fourth Month
- Town Working Session Fifth Month
- Analysis and compilation of goals and objectives by the end of the Fifth month.

### CLIENT INVOLVEMENT

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- Regular attendance of set meetings .
- Active participation in community outreach events.

### TASK 2: FRISCO HOUSING NEEDS ASSESSMENT

Building off 20234 Summit County Housing Needs Assessment, our Consultant Team will develop a housing needs assessment for the Town of Frisco. This involves several key steps that take into account the unique characteristics and needs of Frisco within the Ten Mile Basin. The process should be comprehensive and data-driven, ensuring it effectively captures the current housing situation and anticipates future requirements. Below a structured approach based on the information available from the RFP and general best practices in housing needs assessment:

#### ECONOMIC AND DEMOGRAPHIC FRAMEWORK

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We will provide estimates of current population, housing units, households and employment as well as projections for each over the next five years. We will provide information on the number of residents that live and work in the area, including the types of jobs in which they are employed, their location of employment and their average household incomes. The economic and demographic framework will include specific information such as:

- Demographic trends, focusing on factors like growth trends for age distribution, household size, and income levels.
- Identify the proportion of residents who are cost-burdened by housing.
- Discuss key economic drivers, emphasizing tourism and its impact on the housing market.
- Evaluate the existing housing stock in terms of type, affordability, condition, and occupancy (rental vs. ownership, year-round vs. seasonal use).
- Understand the capacity of residents to occupy housing year-round.

#### HOUSING INVENTORY

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We will describe the housing inventory of both rental (long-term and short-term) and for sale properties using a combination of information from interviews, collected data, past studies, building permits, and assessor's data. As part of the housing inventory our Consultant Team will categorize properties based on usage (year-round occupancy, seasonal, or short-term rentals).

The inventory will include information on the housing age, condition, type, and size of units. We will also work with the SCHA to inventory existing and approved/under construction deed-restricted units in the county (their number, types and locations). As part of this task our Consultant Team will:

- Determine the mismatch between current housing supply and the needs of different demographic groups, including low-income residents, seniors, families, and workers.
- Project future housing needs based on demographic trends, economic development, and urban planning goals.
- Determine Affordability and Accessibility
- Discuss the average costs of housing in Frisco, both in terms of renting and ownership.
- Address the issue of affordability, particularly for lower and median-income groups.
- Highlight any trends in housing prices over recent years.

#### HOUSING MARKET CONDITIONS

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This section will evaluate current conditions and past trends for the ownership and rental markets. For the renter market, this will include occupancy, average rents, renter preferences, trends and information from property

## Town of Frisco

manager interviews. For the ownership market, this will include sales trends, affordability of sales, occupancy, availability of market rate and deed-restricted housing, amenity and design features and residency trends.

As noted in the RFP, we recognize that Frisco wants to understand the goal of 50% of the housing units in Frisco occupied by year-round residents. We will answer the effects of short-term rentals on the availability of long-term rentals and the local economy. We will build off these efforts and provide the frequency of usage and occupancy of units. In part, data for this element will come from the either pre-existing survey or U.S. Census information regarding how units are used, including those owned by second homeowners.

- Enumerate the key challenges facing Frisco's housing market, such as high costs, limited availability, and the impact of tourism.
- Discuss the issue of short-term rentals and their impact on the long-term housing market.
- Mention the specific challenges faced by key demographic groups, including workers and families.
- Delve into the situation of housing for the local workforce, considering the 2019 Frisco Community Plan and its findings.
- Discuss any existing workforce housing programs and their effectiveness.

## GAPS AND ESTIMATED NEED

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We will estimate the total number of housing units needed by residents, both to fill existing gaps in the market and to accommodate future needs based on population and employment growth projections through 2030. The need for additional housing is estimated using a combination of factors – unfilled jobs, overcrowding, in-commuting, replacement of retiring employees and growth in new jobs. The housing supply will be compared to the need for housing to identify any gaps in the availability of housing in different price points, sizes and type categories based on income.

### GOAL > 50% OF OCCUPIED BY YEAR-ROUND RESIDENTS

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As part of Task 2, we will explore the goal of 50% year-round residential occupancy rate. This goal is not just a numerical target but reflects a broader vision for community stability, economic vitality, and social inclusivity. Our Consultant Team will focus on:

- **Current Occupancy Rates:** Determine the current percentage of housing stock occupied by year-round residents. This serves as a baseline for measuring progress.
- **Identify Factors Influencing Occupancy:** Analyze factors that influence housing choices in Frisco, including affordability, availability of workforce housing, and the appeal of the town for permanent residency.
- **Examine Existing Policies:** Review town policies, zoning regulations, and housing programs to identify how they impact year-round occupancy.
- **Best Practices Research:** Investigate best practices from other towns or cities that have successfully increased their year-round occupancy rates.

## TIMELINE

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- Demographic and economic analysis in months 1-3.
- Assessment and gap analysis in months 3-4.

### CLIENT INVOLVEMENT

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- Presentation of findings and draft reports for feedback.
- Involvement in surveys and data collection processes.

### TASK 3: MODELING CAPACITY, IMPACTS AND FINANCING

With this task Frisco's efforts will go beyond the traditional housing needs assessment by evaluating the need for housing in the context of its overall socioeconomic, community development practices and the impact of housing production on Frisco's economy. This task will give the Frisco town staff the tools necessary to predict capacity, potential residential growth, manage growth and create financial models for successful development in the future.

### BUILDOUT MODELS / CAPACITY PLANNING

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By conducting build out models and "what if" scenario planning, the beneficial and negative impacts of additional workforce housing units, at various levels, can be estimated. "What if" scenario planning can be most effective when coupled with a build-out model. Using observed rates of jobs per employee per household, housing production can also be evaluated in terms of total jobs added to the local economy at various levels of unit growth.

Additionally, the nature of the units will likely determine the people/skill sets and jobs, thus "what if" includes "what type" in addition to how many.

### CAPACITY PLANNING

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The Consultant Team will develop an interactive buildout capacity model for Frisco to predict potential residential capacity growth using the following data sources:

- Current and future development codes
- Assessor data for building SQFT information
- Building footprint data from various vendors (e.g. Microsoft, Google, local sources)
- Sewer and water capacity from providers
- Estimated consumption and discharge rates of utilities based upon uses

Our Consultant Team has extensive experience creating buildout / capacity planning models, which can be used to predict potential residential growth on a parcel-by-parcel basis with the "Sites Inventory" and evaluate capacity.

Using our site inventory model, the Consultant Team will simulate alternative housing development scenarios. Scenario planning will be used to predict potential residential growth capacity and will quantify the relationship between the demand for services and the supply of services. The Consultant Team will include in this analysis work force housing projects currently under review and/or development, including the proposed Lake Hill development.

By conducting "what if" scenario planning, the beneficial and negative impacts of additional workforce housing units, at various levels, can be estimated. "What if" scenario planning can be most effective when coupled with a build-out model. The nature of the units will likely determine the people/skill sets and jobs, thus "what if" includes "what type" in addition to how many.

### SITES INVENTORY

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The Consult Team will develop “an inventory of suitable sites” for residential development. This involves identifying and categorizing sites within the town limits that can accommodate residential development, including both vacant and underutilized (non-vacant) sites. This inventory is essential to meet the Town's for various income levels. Key aspects of the inventory process include:

**Combining Different Site Types:** the town can meet housing demand through a mix of planned and approved residential developments (referred to as "Pipeline"), vacant sites, underutilized sites with defined buildout capacities from the zoning definitions, and projected construction of accessory dwelling units (ADUs) based on historical production.

**Zoning and Housing Capacity Analysis:** An analysis will be conducted to ensure that sufficient land is zoned to provide the necessary housing capacity for each income level identified in Task 2. This included evaluating both vacant and non-vacant developable land within the city limits.

**GIS Mapping and Data Analytics:** The Consultant Team will utilize Geographic Information Systems (GIS) mapping software and data analytics to analyze available sites. This involves updating and verifying data sources such as county parcel data and building footprints to enhance the accuracy of vacancy status and potential for redevelopment.

**Classification and Review of Sites:** The Consultant Team will review sites with Town staff for each site's vacancy status and classify them as vacant, underutilized, redevelopment candidates, or unrealistic for redevelopment. This review ensured that realistic capacity numbers were applied to available sites.

**Categorization Based on Income Levels:** The sites will be categorized based on zoning, allowed density, and defined density thresholds appropriate for specific income groups. This categorization included lower-income sites with high-density zoning, moderate-income sites with medium-density zoning, and above moderate-income sites with low-density residential zoning.

**Unit Capacity Calculations:** For vacant sites, unit capacity calculations will be based upon current land use designation density or building form zone density.

**Potential for Redevelopment of Underutilized Sites:** Underutilized sites will be analyzed for their redevelopment potential, focusing on revitalization and conversion to higher density residential use. The analysis includes current uses, redevelopment barriers, and market conditions.

**Developer Interest and Planned Developments:** Underutilized parcels had known developer or owner interest in redevelopment, ranging from initial expressions of interest to formal redevelopment applications. This may demonstrate a commitment to residential growth and economic contribution.

The inventory of suitable sites in an important component of a well-rounded approach to housing planning, integrating legal requirements, community planning, and market dynamics to accommodate the Town's housing needs for all income levels.

**ECONOMIC IMPACTS**

Estimating the economic impacts resulting from constructing workforce housing over a select planning period, helps to determine the feasibility of and barriers to new construction. We will rely on Task 2, for the number of units needed as a function of current job openings (catch-up) and future job growth (keep-up). However, quantifying unit demand is only the first step to addressing Frisco’s housing needs. Knowledge of multiplier impacts can inform policies designed to support economic development, while mitigating potential negative impacts.

In order to quantify the costs and benefits of building housing units, our Consultant Team uses IMPLAN software, which is the gold standard for economic impact analysis and relies on all available government data sources. This software can be used to estimate the economic activity, tax revenues and even environmental impacts arising from housing development, as well as the long-term increase in population. IMPLAN is a very flexible tool for estimating trade-offs.

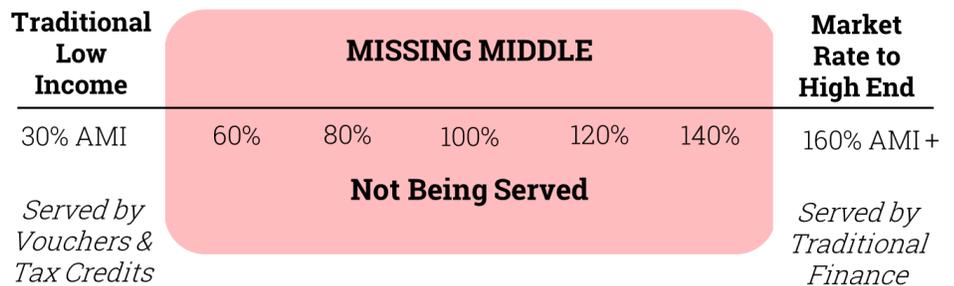


IMPLAN’s economic and environmental data incorporates 546 industries and 823 occupations, creating a comprehensive economic model in an input-output framework. Industry insights include employment, labor income, revenue, intermediate input expenditures, and trade of goods and services, household and government commodity demand, and more. Geographic and demographic data elements include household counts by nine household income categories, savings rates, commuting rates, regional GDP, an economic diversity index, and more. These data sets are updated annually.

Perhaps most importantly, estimates of new jobs required to construct Frisco’s housing needs will be provided and compared to the existing workforce.

**CREATING FINANCIAL MODELS FOR SUCCESS**

Figure 4 illustrates the concept of the “missing middle” category of households making anywhere between 60% to 120% area median income (AMI) and up to 140% of AMI and beyond in resort areas. Orientating development towards these middle-income workforce households is difficult, as these households are unable to afford the



*Figure 4: Illustration of the “Missing Middle”*

ever-increasing cost of market-rate home ownership and rents yet receive no relief from tax credits and vouchers such as those that assist Low-Income Housing Tax Credit (LIHTC) housing development targeted for households earning below 60% AMI.

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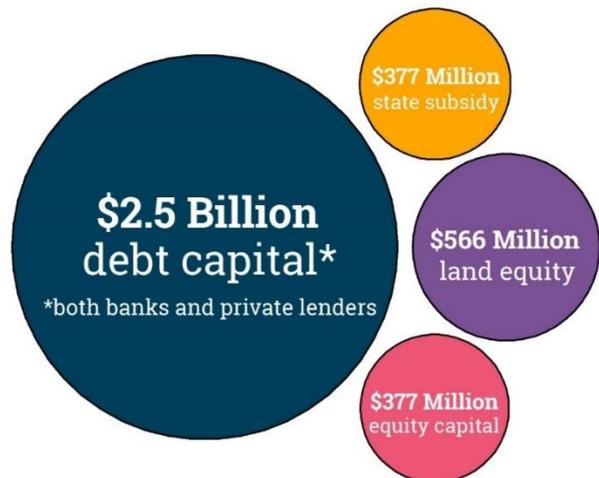
The guiding principle in real estate proforma modeling is that the cost of a project, or the “use of funds”, must equal the financing for the project, or the “source of funds.” For modeling purposes, the use of funds tends to fall into five categories:

- Site acquisition (purchasing, leasing);
- Construction or rehabilitation, including a contingency allowance;
- Soft costs (entitlements, appraisals, marketing, surveys, taxes, insurance, and fees for architectural, engineering, legal, accounting, and other services);
- Development fees and developer’s overhead and profit; and
- Financing fees (construction period interest, loan fees, closing costs).

Our Consultant Team generally models three categories of funds to cover these costs:

- **Debt** - This is borrowed money, generally paid back with interest. Some debt sources may have more flexible rates and terms than others. Some debt is soft or deferred, meaning that it gets paid back only if the project’s cash flow permits or at the time of sale. It may be forgiven entirely if the development continues to serve income-eligible people for an extended period of time.
- **Equity** - This is cash financing that is not paid back with interest but is viewed as an investment with an expected, though not guaranteed, return. Equity for affordable rental housing generally comes from the developer and the sale of tax credits. In affordable ownership developments, equity comes from the developer.
- **Subsidies or Grants** - These are funds to fill the gap between total development costs and what can be financed with debt or equity. This is usually required for affordable housing projects because of the limited rents or sale prices that low- and moderate-income households can afford. Subsidies or grants are usually provided by governmental entities.

**\$3.8 Billion**  
to build workforce housing need by 2023



... represents less than **0.05%** of the total value of Colorado’s residential housing market

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*Figure 5: Required Capital from Example Project*

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Once models are completed our Consultant Team can model debt capital, land equity, and equity capital to build workforce housing in the Frisco. Figure 6 provides an example of funding needed to build workforce housing in Colorado’s Region 10.

**SPECIAL LIMITED PARTNERSHIPS**

Many affordable housing projects involve more planning and entail greater risks than similar market-rate projects due to the layers of financing required and the complexities of public-private partnerships. Creating and preserving affordable housing requires many different stakeholders to work together in order to provide the various incentives and benefits needed on all sides. An emerging group of developers is utilizing public-private partnerships<sup>2</sup> and special limited partnerships<sup>3</sup> to share risk and return with the public sector in Colorado. Figure 7 provides a diagram of how special limited partnerships can enable a team of experts and leverage resources to augment this development. A special limited partnership consists of the partners and consultants working to complete a single development. The Consultant Team explore the use of community land trusts, local housing authorities and private sector developers to reduced bottlenecks identified in the financial modeling process.



**MANAGING GROWTH IN FRISCO WITH MODELING TECHNIQS**

Managing growth in Frisco using site inventory and modeling techniques involves several key components as

*Figure 7: Example Partnership Opportunities for Project Funding Success*

**Interactive Buildout Model:** The creation of an interactive buildout model for Frisco is a crucial tool. This model will predict development capacity, potential residential growth and simulate alternative housing development scenarios. The scenario planning will help to understand potential residential growth capacity and quantify the relationship between the demand for services and the supply of these services, which is necessary for predicting future demand for services and supporting tax revenues.

**Financial Models:** Developing financial models to identify appropriate funding sources is essential. These models will help in identifying private/public partnerships and local, state, and federal funding sources.

<sup>2</sup> Public-private partnerships involve collaboration between a government agency and a private-sector company that can be used to finance, build, and operate projects, such as housing projects.

<sup>3</sup> A special limited partnership (SLP) is composed of at least one general partner ("GP") and one or several limited partner(s) (LPs). A partner may be a GP and an LP at the same time.

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**Recommendations for Growth Management:** Providing recommendations on how to manage growth in Frisco, including changes in zoning, taxation, and other relevant areas, is a vital part of the process.

**Analysis of Housing Unit Occupation Goals:** The RFP includes an analysis of the goal of having 50% of the housing units in Frisco occupied by year-round residents. This analysis will consider whether this goal is appropriate, what it means for the other 50% of the housing units, and whether this goal aligns with the housing needs assessment for Frisco.

**Consideration of Specific Housing Projects:** Including analysis of specific workforce housing projects currently under review or in development is also part of the task. One such project is Lake Hill, a proposed development on a 44.81-acre parcel acquired by Summit County from the United States Forest Service. This development is envisioned to have 436 units, including multi-family units, duplex units, and townhomes, with a mix of ownership and rental options. The analysis would consider scenarios both with and without the construction of Lake Hill, as this project will significantly impact Frisco's housing landscape.

## TASK 3 TIMELINE

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- Development of the buildout model in months: 3-5.
- Scenario analysis and recommendations in months 3-4.

## CLIENT INVOLVEMENT

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- Interactive sessions to review and refine scenarios.
- Discussions on potential funding and partnerships.

### TASK 4: FRISCO STRATEGIC HOUSING PLAN - TURNING TO ACTION

As a team, we bring the experience and expertise necessary to develop an implementable strategic housing plan to address Frisco's community-wide housing problem; maximize partnerships, sharing, and application of resources; and focus momentum toward a common vision supported by measurable goals and actions within the Town of Frisco.

It should address the entire spectrum of housing needs, utilizing a diverse array of tools and techniques. Recognizing the complexity of housing challenges, our approach is grounded in an incremental implementation, ensuring each step builds on the last and adapts to evolving circumstances.

Central to this strategy as mentioned our philosophy to housing is a commitment to fairness, where responsibility for housing solutions is broadly distributed across the community, supported by a mix of incentives and regulatory measures.

A well-informed, data-driven approach ensures that decisions are based on current and accurate information. The strategy also acknowledges the need for local funding sources to fill the gap between housing costs and what is affordable for Frisco residents, supplemented by external grants where available.

Critical to the success of this strategy is the expertise and capacity to implement and manage the program effectively, which will naturally expand as the scope of housing solutions grows. Clear assignment and acceptance of responsibilities, strong community ownership and support, ongoing educational efforts, sustained political will, and adaptability over time are the pillars that will uphold this comprehensive housing strategy, ensuring it remains responsive and effective in addressing Frisco's housing needs now and in the future.



*Figure 8: Mixed Income Housing Project Example*

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### COMPONENTS OF THE STRATEGIC HOUSING PLAN

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**Customized to Community:** The cornerstone of a successful housing strategy for Frisco is its customization to the unique needs, opportunities, and challenges of the community. The strategy must build upon Frisco's distinctive character, leveraging local resources, and respecting the town's historical and environmental context.

**Multiple Tools for Diverse Needs:** Recognizing that there is no one-size-fits-all solution, our strategy will utilize a variety of tools in combination. This multi-faceted approach aims to create a diverse supply of housing options, catering to the full spectrum of community needs, from affordable housing for low-income residents to suitable options for middle-income families.

**Incremental Approach:** Implementation will be gradual, building upon each success. This allows for adaptability and refinement over time, ensuring that the strategy evolves in line with the changing expertise, needs, challenges, and opportunities in Frisco.

**Fairness with Responsibility:** The responsibility for housing provision should be shared across the community. This includes a mix of incentives ("carrots") and regulatory measures ("sticks") to ensure broad community support and equitable distribution of housing resources.

**Well-Informed Decisions:** Our approach will be data-driven, grounded in current information on Frisco's housing market conditions, economic landscape, and demographic trends. This ensures that decisions are relevant and effective.

**Local Funding for Affordability:** Recognizing the limitations of federal and state funding, our strategy will focus on local funding mechanisms to bridge the affordability gap. This includes exploring innovative local financing options and partnerships.

**Expertise and Capacity to Implement:** Successful implementation requires a skilled team with expertise in various areas, including site analysis, development, financing, and property management. As the program expands, so will the need for specialized staffing and management.

**Clear Responsibilities:** Defining and assigning clear responsibilities is crucial. While there's no superior organizational model, the involvement of local governance and leadership will be a significant component of the strategy's success.

**Community Ownership and Support:** Gaining and maintaining community support is key. This involves generating political will, managing opposition, and ensuring community buy-in for planned projects and new regulations.

**Ongoing Education:** Educating the community about the value of meeting housing needs is essential. Continuous communication about progress and success helps to build support and demonstrates the tangible benefits of the housing strategy.

**Sustained Political Will:** The effectiveness of the housing strategy hinges on consistent political support. This requires ongoing engagement with political stakeholders and the community to maintain momentum over time.

**Adaptability Over Time:** The housing strategy should be flexible, with periodic evaluations and adjustments based on lessons learned, changing needs, and emerging opportunities. This ensures that the strategy remains relevant and effective in the long term.

In conclusion, a successful housing strategy for Frisco is one that is community-specific, multifaceted, incremental, fair, well-informed, locally funded, expertly managed, clearly defined, community-supported, educational, politically supported, and adaptable. This comprehensive approach is essential to meet the evolving housing needs of Frisco's residents.

### STAKEHOLDER COORDINATION

For this process we suggest the formation of a Community Housing Committee composed of active community members and stakeholders. The goal of this committee is to ensure the development of a community-supported strategic housing plan that aligns with the Town's Strategic Objectives. Through a series of meetings and discussions with Committee members, the Town of Frisco, and public feedback we will:

- Target community goals and actions related to local housing needs;
- Explore and prioritize strategies, including existing strategies;
- Establish roles, responsibilities, and timing; and
- Discuss a framework for the overall management, tracking, and updates of the plan.

We suggest five (5) work sessions with the Community Housing Committee. Each session will be 2 to 3-hours in length. Prior to each work session, Committee participants will receive information on the housing needs and data related to the work session topic, a summary of the prior work session (if applicable), and questions to help prepare participants for each session.

### FORMATION OF COMMUNITY HOUSING COMMITTEE

We will seek help from the town to identify and recruit necessary participants to engage in the formation of the Community Housing Committee. This will include potential community partners to collaborate on addressing local housing needs, for example, representatives from the town, county, sewer district, local and/or regional organizations and non-profits, developers, real estate professionals, and employers.



### **PROJECT ORIENTATION – INTRODUCTION OF GOALS AND OBJECTIVES**

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We will bring the Community Housing Committee and Town Staff together to provide a summary of data and key findings from Task 2. Housing Needs Assessment, present an overview of the process, explain the role of Housing Committee members, Town Staff and Town boards, and the public, and present information on the task to achieve – a community plan to help fill local housing gaps and needs in the community. We will also introduce housing goals and objectives, building upon existing goals in the Town, and get feedback from the group. Objectives will be designed to provide measurable targets by which progress can be monitored. We will revisit goals and objectives in the last work session.

### **STRATEGY IDENTIFICATION AND INITIAL PRIORITIZATION**

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We will consider existing and new strategies that cover the range of housing needed by Frisco residents and employees. Our team will lead the group through a prioritization process and identify strategies that are particularly appropriate for Frisco. We will bring forward best practices from other communities to expand the groups knowledge and potentially spur some new ideas in light of local capacities and resources. Outcomes from Task 3. Modeling Capacity, Impacts and Financing is a necessary discussion during this phase. Later sessions will refine selected strategies and verify their prioritization and implementation steps.

### **STRATEGY REFINEMENT OF PRIORITIZED TOOLS**

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Next, we would focus on the strategy options most appropriate for the community. This will include two work sessions to focus on identified priorities and discuss implementation needs and steps tailored to Frisco. Best practices for specific strategies will be brought forward to help inform discussions. We will discuss with the Committee any additions to the provided information, as well as implementation steps and timeline, resources available or needed and roles and responsibilities.

Information will be provided to the working group for each tool, identifying:

- Issues unique to Frisco and considerations for implementation;
- Population that will be targeted by own/rent and income level;
- Potential sources of funding; and
- General considerations in implementation.

### **DRAFT PLAN REVIEW AND FINAL PLAN DEVELOPMENT**

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Plan refinement will involve the establishment of roles, responsibilities, timing, and management. For each priority strategy, we will identify which partners will be involved, and timing for implementation. This will prepare the housing strategy for action. An overall management structure for the plan, including monitoring, tracking progress, and updates, will be discussed. Where necessary, we will recommend land use code and/or zoning text amendment language. The goal is to ensure that the Plan continues to have life, is tracked and updated, regional and local partnerships continue, and communication to the broader community occurs on a regular basis.

## **Town of Frisco**

Housing Needs Assessment and Strategic Housing Action Plan

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### **COMMUNITY OUTREACH**

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Residents of Frisco should expect the outreach process to be straight forward, thoughtful, and easily integrated into their lives. Decision-makers should expect the public's feedback to be synthesized efficiently and transparently to provide quantified information to decision-makers.

#### **PUBLIC OPEN HOUSES AND ONLINE QUESTIONNAIRES (2)**

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We believe that it is imperative for communities to determine what they are trying to accomplish before they work on regulations to do so. It is not enough to simply set out to address your needs. We propose to host an open house for the public, staff, and the Committee early in the process to learn about and weigh in on the housing vision, needs and priorities. We will host a second open house to allow the public to review and provide feedback on the draft housing strategies, revisit public housing priorities, and solicit input on the Strategic Plan roles and responsibilities.

#### **TOWN COUNCIL WORK SESSION**

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We will host a work session with the Town Council to discuss the first draft of the Strategic Housing Plan. Work sessions provide an opportunity for council members to offer guidance, voice concerns, and contribute their expertise to the housing strategy. These meetings are instrumental in ensuring that the housing goals remain aligned with the town's overall vision and that there is continuous political support for the initiatives.

#### **FINAL PRESENTATION WITH THE PLANNING COMMISSION AND TOWN COUNCIL**

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We will seek Committee member assistance in presenting results, as appropriate. The objective is to explain the Plan, the process of its development, participants, and identified partners moving forward. Ideally, each community participant involved in the Plan's implementation will "accept" the plan and their identified roles, and then proceed with developing their housing work plan to implement their tasks. This presentation can be used to set the stage for eventual acceptance of the plan by necessary partners.

## ADDITIONAL ITEMS

PLEASE VISIT OUR PROPOSAL WEBSITE TO EXPLORE MORE:

<http://dynamicplanning.co/frisco/>

**Town of Frisco**

Housing Needs Assessment and Strategic Housing Action Plan

**SCHEDULE**

**2024**

Milestone	Start	Days	End	1	2	3	4	5	6	7	8	9	10	
Project Management	1/1/24	151	5/31/24	█										
Task 1. Identify Goals & Objectives	1/1/24	30	1/31/24	●										
Task 2. Frisco Housing Needs Assessment	2/1/24	60	4/1/24		█	●								
Task 3. Modeling Capacity, Impacts, and Financing	2/1/24	90	5/1/24		█	█								
Task 4. Frisco Strategic Housing Plan - Turning to Action	2/1/24	120	5/31/24		█	█	█							

Town Council Work Sessions

Public Engagement Mtgs.

Detailed MS Project Schedule will be developed upon award.

# Town of Frisco

Housing Needs Assessment and Strategic Housing Action Plan

## RATE SCHEDULE

### Town of Frisco

Housing Needs Assessment and Strategic Housing Action Plan

### Cost Estimate

	 <b>Dynamic Planning + Science</b>					Subconsultants					GRAND TOTAL		
	Ethan Mobley Principal	Brian Greer Data Viz.	Raini Ott Planner	Alex Krebs Data Viz. Assoc.	SUBTOTAL		Triple Point	Western Spaces	Castlewood Capital	SUBTOTAL		HOURS	COST
	\$165/hr	\$155/hr	\$110/hr	\$100/hr	Hours	Cost	\$155/hr	\$165/hr	\$155/hr	Hours	Cost		
Project Management	40	10	0	0	50	\$ 8,150	4	4	4	12	\$ 1,900	62	\$ 10,050
Task 1. Identify Goals and Objectives	20	8	20	0	48	\$ 6,740	24	20	4	48	\$ 7,640	96	\$ 14,380
Task 2. Housing Needs Assessment	20	40	80	10	150	\$ 19,300	20	80	4	104	\$ 16,920	254	\$ 36,220
Task 3. Modeling Capacity, Impacts, and Financing	20	80	40	10	150	\$ 21,100	100	20	80	200	\$ 31,200	350	\$ 52,300
Task 4. Frisco Strategic Housing Plan - Turning to Action	20	40	80	10	150	\$ 19,300	40	160	10	210	\$ 34,150	360	\$ 53,450
ODC - Meeting Travel / Printing / ODC						\$ 2,000					\$ 2,000		\$ 4,000
ODC - IMPLAN License						\$ 3,500					\$ -		\$ 3,500
<b>Project Totals</b>	<b>120</b>	<b>178</b>	<b>220</b>	<b>30</b>	<b>548</b>	<b>\$ 80,090</b>	<b>188</b>	<b>284</b>	<b>102</b>	<b>574</b>	<b>\$ 93,810</b>	<b>1122</b>	<b>\$ 173,900</b>

## APPENDIX A. STAFF RESUMES

Please find full project team resumes on the following pages.



**Ethan E. Mobley, AICP**

Project Manager | Owner

**Years of Experience: 20**

## EDUCATION

B.S., 2004, Urban Planning, Arizona State University

## LICENSES/CERTIFICATIONS

American Institute of Certified Planners (AICP), Since 2007

## MEMBERSHIPS/ASSOCIATIONS

American Planning Association  
Member

American Institute of Architects  
Associate

National Fire Protection Association  
Member

American Fire Sprinkler Association  
Member

California Emergency Services  
Association Member

Floodplain Management Association  
Member

## EMPLOYMENT HISTORY

**Michael Baker International,**  
Oakland, CA, 2010-2015. Planning  
Manager

**Vernadero Group,** Tempe, AZ, 2009-  
2010. Planning and Engineering  
Manager

**Michael Baker International,**  
Alexandria, VA/Phoenix, AZ, 2004-  
2009. GIS Associate/ Architectural  
Assistant

**Arizona State University,** Tempe, AZ,  
1998-2004. Architect and Project  
Management Assistant

## GENERAL QUALIFICATIONS

Ethan is the owner and operator of Dynamic Planning + Science. He has over 20 years of experience working for local, state, and federal clients. Prior to starting Dynamic Planning + Science, Mr. Mobley worked at Arizona State University in the facilities division as an Architect and thereafter as a government contractor leading some of our nation's most important planning projects.

He specializes in project management for general plans, hazard mitigation plans, infrastructure protection, CEQA compliance and environmental document peer review; and public outreach and consensus-building.

Ethan is currently Project Director on general plan updates for the cities of Shasta Lake and the City of Isleton in California. Ethan's broad experience, in both the public and private sector, in land use planning, urban design, architecture, data base design and analysis, enables him to bring a wealth of experience to every project.

Ethan has extensive experience in supervising large planning staffs and managing interdisciplinary consultant teams on complex planning projects and will lead this project from cradle to grave.

## SELECT PROJECT EXPERIENCE

**Region 10 Housing Metadata Analysis.** *Montrose, CO.* Project Manager.

**City of Napa Housing Element Update.** *Napa, CA.* Project Manager/Lead Planner.

**City of Isleton General Plan Update & Housing Element.** *City of Isleton, CA.* Project Manager/Lead Planner.

**City of Shasta Lake General Plan Update & Housing Element.** *Shasta Lake, CA.* Project Manager/Lead Planner.

**City of Tehama General Plan Update.** *Tehama, CA.* Project Manager/Lead Planner.

**Trinity County General Plan Update.** *Trinity County, CA.* Lead Planner.

**Benicia Defensible Space & Vegetative Fuels Management Plan.** *Benicia, California. CA.* Project Manager.

**Kern County Hazard Mitigation Plan Update.** *Kern County California. CA.* Project Manager.

**Tehama County Multi-Jurisdictional Hazard Mitigation Plan Update.** *Tehama County, CA.* Project Manager.



## Brian Greer

GIS & Data Visualization Manager | Co-Owner

**Years of Experience: 10**

### EDUCATION

B.S., 2008, Geography,  
California State University, Hayward

### LICENSES/CERTIFICATIONS

Adobe Certified Expert, Illustrator

### MEMBERSHIPS/ASSOCIATIONS

North American Cartographic  
Information Society (NACIS)

Bay Area Automated Mapping  
Association (BAAMA)

BayGeo Cartography Group

California Emergency Services  
Association (CESA)

### AWARDS

California Emergency Services  
Association (CESA) Coastal  
Chapter Silver Award, 2012

GISPCI Map Design Award, 2012

### EMPLOYMENT HISTORY

**Lettis Consultants International, Inc.,**

Walnut Creek, CA, 2014-2015. GIS

Analyst/Cartographer

**URS** Oakland, CA, 2012-2014. GIS

Analyst/Cartographer

**Endpoint Environmental,** San  
Francisco, CA, 2012. Cartographer

**Michael Baker International,**  
Oakland, CA, 2009-2012. GIS Associate

**Contra Costa County Department of  
IT,** Martinez, CA, 2007-2009.

Information Systems Programmer  
Analyst

### GENERAL QUALIFICATIONS

Mr. Greer has the vision, skill, and imagination needed to conceptualize and communicate the role that geospatial technology plays in intricate projects. His deliverables provide the visual information necessary to explain complex data to the public. He has a solid foundation in GIS principles including geography, cartography, Python scripting, GPS data collection & processing, CAD-GIS interoperability. With a suite of software knowledge, his work centers on integrating graphic and spatial software to produce results designed to communicate. He currently leads large geospatial data management and mapping efforts for multiple projects.

Mr. Greer's work has been focused on delivering high-end products to clients across the nation. His skillset has resulted in various customized tools that enable enhanced deliverables in General Plan development. Mr. Greer has designed rich interactive web maps, a dynamic Build Out calculation model, and a robust site inventory database, calculation, and visualization tool with rapid scenario outputs. Brian is a GIS Cartographer whose deliverables provide the visual information necessary to understand complex data and give clients a way to deliver a powerful message with professional graphic appeal. With a suite of software knowledge, his work centers on integrating graphic and spatial software resulting in products designed to communicate. Mr. Greer's work can be seen on the walls of FEMA Headquarters, US Army Corps map books, and the Congressional floor.

### SELECT PROJECT EXPERIENCE

**Region 10 Housing Metadata Analysis.** *Montrose, CO.* Data Visualization Manager.

**City of Napa Housing Element Update.** *Napa, CA.* GIS & Data Visualization Manager.

**City of Shasta Lake General Plan Update & Housing Element.** *Shasta Lake, CA.* GIS & Data Visualization Manager.

**City of Isleton General Plan Update & Housing Element.** *City of Isleton, CA.* GIS & Data Visualization Manager.

**City of Tehama General Plan Update.** *Tehama, CA.* GIS & Data Visualization Manager.

**Trinity County General Plan Update.** *Trinity County, CA..* GIS & Data Visualization Lead.

**Benicia Defensible Space & Vegetative Fuels Management Plan.** *Benicia, California. CA.* GIS & Data Visualization Manager.



# SARAH BROWN MCCLAIN

CEO Western Spaces, LLC

**17 YEARS EXPERIENCE • 970-275-3154 • SARAH@WESTERNSPACES.CO**

Sarah Brown McClain is the founder of Western Spaces, LLC, a natural evolution from her previous venture, BalancedCommunity, Inc. With a passion for economic development, environmental preservation and workforce housing, Sarah is committed to crafting holistic, diverse communities that nurture both residents and visitors. Her skill set spans housing research, urban planning, data collection, analysis, civic tech, and policy development. Over the past 17 years, Sarah has dedicated herself to housing-specific studies across the Mountain West, demonstrating her expertise in the field. She holds an undergraduate degree in Environmental Policy, complemented by a Master's in Urban Planning. Throughout her life, Sarah has been a steadfast advocate for affordable housing, community development, and environmental preservation, making her a respected leader in her field.

## RECENT PROJECTS

- Summit County Comprehensive Plan Update 2023/2024
- Proposition 123 Technical Assistance 2023
- Summit School District Housing Needs Assessment and Program Development 2023/2024
- City of Cortez Housing Action Plan and Code Update 2023
- Summit County (Dillon) Forest Service Exchange Market Analysis 2023
- Town of Vail West Middle Creek Housing Analysis 2023/2024
- Town of Telluride Market Analysis 2023/2024
- Prowers County Comprehensive Plan Update 2023/2024
- The Commons Buena Vista Housing Analysis 2023/2024
- Town of Crested Butte Housing Market Analysis 2022
- Western Colorado University Market Analysis 2022
- Town of Vail Timber Ridge Redevelopment Demand Study 2022
- Town of Pagosa Springs Market Analysis 2022

## EDUCATION

- Master's Urban and Regional Planning, CU Denver 2006
- BA Environmental Policy, CU Boulder 1999

## EMPLOYMENT HISTORY

- Founder Western Spaces, LLC - 2021 to present
- Founder Balanced Community, LLC - 2010 to 2020
- Co-Chair PLAN Boulder - 2011 to 2015
- Instructor CU Boulder Geodesign and the Web - 2011 to 2014
- Senior Housing Specialist RRC Associates, Inc. - 2006 to 2010

## RELEVANT EXPERIENCE

- Housing Needs Assessments
- Housing Strategies
- Housing Market Analysis
- Housing Program Analysis
- Housing Action Plans
- Comprehensive Plans
- Community Surveys
- Spatial Analysis
- Community Development
- Civic Tech and Data Visualization

## PROFESSIONAL ASSOCIATIONS

- American Planning Association - AICP
- Housing Colorado
- CU Boulder Alumni Association

## COMMUNITY

- Summit County Ten Mile Planning Commissioner
- Board of Directors Blue River Horse Center
- Board of Directors Telluride Tech Festival

## RESPONSIBILITIES

- Guidance on housing and related components of the plan
- Community engagement support
- Local knowledge and in-person facilitation
- Research and plan authorship
- Survey analysis and incorporation



**Analyze the Past \* Understand Today \* Plan for Tomorrow**

# WESTERN SPACES, LLC

## UNLOCKING POSSIBILITIES: YOUR PARTNER IN INNOVATIVE HOUSING AND PLANNING SOLUTIONS

At Western Spaces, LLC, we are your trusted partner in transforming visions into realities. Our firm, based in the picturesque Summit County, Colorado, is dedicated to pioneering cutting-edge solutions in housing, land use analysis, and strategic planning. Allow us to introduce ourselves and showcase our expertise in shaping vibrant communities.

### OUR LEGACY OF EXCELLENCE

With a seasoned team led by our CEO, Sarah McClain, Western Spaces has a track record of successfully completing housing needs assessments and housing strategies across urban, rural, and resort areas in the Western United States. Our commitment to excellence is evident in the numerous city, countywide, and regional housing initiatives we've undertaken.

### OUR HOLISTIC APPROACH

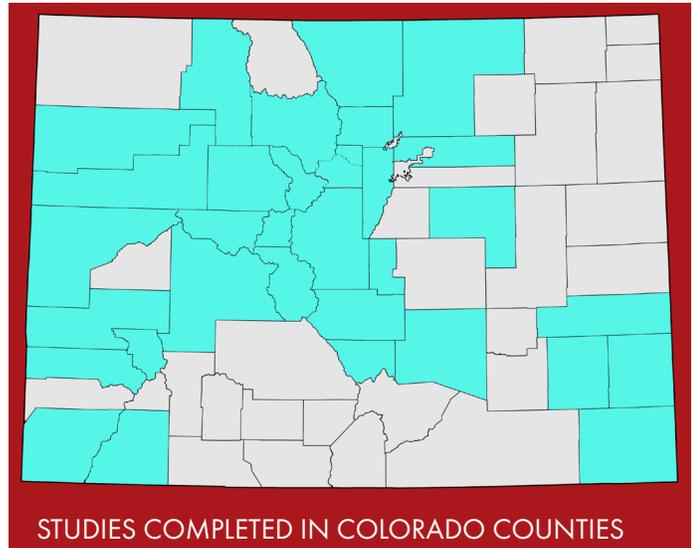
Our unique approach is built on three pillars: understanding the past, navigating the present, and planning for the future. We specialize in crafting diverse and thriving communities where residents and visitors can flourish together. Our data-driven insights, combined with our strategic thinking, enable us to offer innovative solutions tailored to your needs.

### ENGAGEMENT STRATEGIES THAT DRIVE RESULTS

We believe in the power of engagement. Our team is adept at developing web-based tools, Geographic Information Systems (GIS), web-based mapping, and data visualization techniques that empower communities and enhance decision-making processes. Your active participation is at the heart of our success.

### YOUR PARTNER IN PROGRESS

Western Spaces, LLC, is more than a consulting firm; we are your partner in progress. Together, we can unlock the potential of your community, revitalize housing strategies, and shape a brighter future.



### A COMPREHENSIVE SUITE OF SERVICES

Western Spaces offers a comprehensive range of services to address your housing and planning needs. From in-depth market studies and needs assessments to the precise development and implementation of housing strategies, we have you covered. Our expertise extends to comprehensive planning, parks and recreation planning, economic development strategies, and community surveys.

#### HOUSING

- Market Studies
- Housing Needs Assessments
- Housing Strategy
- Development
- Housing Program Implementation

#### PLANNING

- Comprehensive Plans
- Parks and Recreation Plans
- Economic Development
- Community Surveys

#### ENGAGEMENT

- Development of Web Based Tools
- GIS and Web based mapping
- Applications for Community Engagement
- Data Visualization

**Analyze the Past \* Understand Today \* Plan for Tomorrow**

# Jeff Moffett, Ph.D.



## **Triple Point Strategic Consulting**

Jeff has over thirty years of experience working in the fields of economic analysis, resource allocation, business development, and data-driven marketing. Jeff has conducted many economic assessments.

In 2013, Jeff founded Triple Point Strategic Consulting to provide custom economic models and data analysis services. Focus areas are renewable energy, affordable housing, health assessments, sustainable tourism, and economic development. Triple Point is active across the western United States and Canada modeling for scenario planning, financial forecasting, permitting and approvals, optimal resource allocation, and improved decision-making. Economic impact studies are conducted using the IMPLAN model.

Recent housing projects include market studies in several Colorado mountain communities including Leadville, a proforma municipal budget of Keystone, CO prior to incorporation, housing needs assessments in Cortez and the Roaring Fork Valley, creating a financial model of the Aspen School District's housing division, a six-county housing market analysis for Region 10 in western Colorado, forecasting municipal finances of several ski resort towns, and several fiscal impact studies for proposed housing developments.

Jeff earned his M.S. in Econometrics and Ph.D. in Applied Statistics at the University of Washington, Seattle. Jeff has served on many boards including KBUT Radio Station as Board President, Crested Butte Nordic as Board Treasurer, Gunnison Crested Butte Air Alliance as Board Treasurer, and the Gunnison Crested Butte Tourism Association as Board President.

## **Select Housing and Socioeconomic Studies**

- Socioeconomic Assessment and Housing Market Analysis of Buena Vista, CO, 2020
- Socioeconomic Assessment and Housing Market Analysis of Chaffee County, CO, 2020
- Socioeconomic Assessment and Housing Market Analysis of Lake County, CO, 2021
- Socioeconomic Assessment and Housing Market Analysis of City of Gunnison, CO, 2021
- Socioeconomic Assessment and Housing Market Analysis of City of Montrose, CO, 2021
- Socioeconomic Assessment and Housing Market Analysis of Buena Vista, CO, 2021
- Financial Proforma Scenario Planning, Valley Housing Fund, Crested Butte, CO 2022
- Socioeconomic Assessment and Housing Market Analysis of City of Gunnison, CO, 2022
- Region 10 Housing Meta-Analysis, western CO, 2022
- Proforma Budget Model for the Incorporation of Keystone, Summit County, CO 2022
- Housing Needs Assessment for the City of Cortez, CO, 2023
- Workforce Housing Innovation Study, West Mountain Regional Housing Coalition, CO, 2023
- Socioeconomic Assessment and Housing Market Analysis of Lake County, CO, 2023
- Market Assessment and Demand Study of Remington Ranch, Gypsum, CO, current
- Water Resource Modeling, Canyon County, ID, current

# Michael Spencer Leahey

4845 Pearl East Circle, Boulder, CO 80301

[Leahey23@gmail.com](mailto:Leahey23@gmail.com)

(303) 720-5663



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## CORE COMPETENCIES

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- ◆ Raising and Managing Debt & Equity Capital
- ◆ Financial Analysis
- ◆ Management Reporting & Dashboards
- ◆ Project Management
- ◆ Budgeting & Forecasting
- ◆ Strategic Planning
- ◆ Green Building & Energy Efficiency

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## EDUCATION

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Penn State University	Master of Community Economic Development (Agricultural Economics)	2010
University of North Carolina	Bachelor of Science in Business Administration (Honors)	1999

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## EXPERIENCE

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**Castlewood Consulting      Capital Markets & Strategic Planning Consultant      Denver, CO      2016 – Present**  
*Management consultancy focused on debt and equity financing for real estate firms and startup cleantech / agriculture companies*

Provided Finance, Accounting, Capital Markets, and Operational consulting services to real estate clients  
Developed business plan and financing request for Gateway Village, a \$100M master planned workforce community  
Helped nonprofit divest \$75M of real estate assets to channel funding into strategic plan initiatives  
Originated \$50M of construction financing (including bank, private, agency, and life company)  
Responsible for developing Mountain West office, business plan, brand, and go-to-market strategy  
Consulted on PACE financing projects totaling \$25M for projects in the Multifamily, Hospitality, & Retail sectors  
Responsible for developing Mountain West office, business plan, brand, and go-to-market strategy

**Wall Development Group      Chief Financial Officer      Denver      2013 - 2016**  
*Niche commercial real development firm – design, build, sell – in the retail, industrial, and mixed-use sectors*  
Structured, raised and managed \$30M in construction projects in five states with five-person team  
Implemented waterfall equity structure which reduced cost of equity from 25% to 15%  
Managed finance, accounting, HR, IT, and operations as company grew from 2 to 8 employees

**Sustainable Community Initiative      Executive Director      Asheville, NC      2009-2012**  
*Niche commercial real development firm – design, build, sell – in the retail, industrial, and mixed-use sectors*  
Managed 12-organization grant team in securing \$3M Federal Grant monies to fund nonprofit  
Created Community Engagement tools allowing organization to develop programming and financial support  
Led the financial effort for the River Arts District \$50M mixed use redevelopment and environmental remediation

**GE Capital      Financial Analyst / Corporate Auditor / Director of Finance      New York, NY      1999 - 2008**  
*Graduated from the premiere corporate leadership program and promoted to elite Corporate Audit Staff*  
Audited \$500M in GE Capital reserves resulting in \$30M P&L adjustments and new policy improvements  
Oversaw a \$1B equity portfolio and managed Mark-to-Market policy resulting in \$400M write off

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## OTHER EXPERIENCE, SKILLS, AND TRAINING

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USDA and DOE Principal Advisor, 2011 – 2018  
NREL EnergyCorp Principal Advisor, 2017  
Certified Corporate Management & Leadership Trainer 2012 - 2017  
Warren Wilson College - Adjunct Business Faculty 2012 – 2014  
Speaker, TEDx Asheville, “Sustainable Community Economic Development”  
Lean Six Sigma Blackbelt 2001-2004  
GE Financial Management Program Graduate – Global Honors 2001  
Permaculture Design Certification (2006)

# Michael Leahey

## Principal, Castlewood Capital Advisors



Michael Leahey is the founder and principal director of Castlewood Capital Advisors.

Castlewood specializes in developing ‘Public Private Partnerships’ that bring the best talents of the public and private sectors together, to produce social impact development. Examples include master planned workforce housing communities, mixed use redevelopment and environmental remediation, and deploying energy efficiency and clean energy solutions.

We bring a sense of creativity to financing, which is reflected in the solutions that we bring to each project. Some of those financial solutions include expertise in traditional financing through banks and private lenders, and some are more complex, including municipal bonds, tax increment finance, property assessed clean energy, renewable and historic tax credits, and debt and equity structure.

Across his 20+ year career, Michael has worked with a diverse group of clients, from public to private, small to large, domestically and internationally. Some of his best known clients include the US Army, and the USDA; the Cities of Golden, CO, Westminster, CO, Asheville, NC, and Bloomington, IN; the Counties of Chaffee County, CO, Buncombe County, NC, and Orange County, FL; corporations including US Steel, Liberty Mutual Insurance, General Electric, NBC and CNBC, and LDG Development; and nonprofits including the Affordable Housing Corporation, the Community Foundation, the Pacific School of Religion, Warren Wilson University, and the Asheville Art Council.



Outside of Castlewood, Michael speaks and writes on “Creative Intelligence”, futurism, and practical solutions for sustainability and social impact housing. Originally from St. Louis, MO, Michael is attracted to living in diverse, evolving communities, from Brooklyn, NY, to Asheville, NC, to Oakland, CA, to Hilo, Hawai’i. He enjoys world travel, having been to over forty countries, as well as hiking, biking, and Nordic skiing across his adopted Rocky Mountain home.

**Michael Leahey, Principal**  
**Castlewood Capital Advisors**  
**Denver & Leadville CO**  
[michael@castlewood-capital.com](mailto:michael@castlewood-capital.com)  
**(303) 720-5663**



## Jean Lorraine "Raini" Ott

Community Planner | She/Her

**Years of Experience: 8**

### EDUCATION

B.S., 2014, Environmental Policy and Planning, Virginia Polytechnic Institute and State University (Virginia Tech)

### LICENSES/CERTIFICATIONS

Certified Planner (AICP)

Certified Floodplain Manager (CFM)

### MEMBERSHIPS/ASSOCIATIONS

American Planning Association (APA)

American Institute of Certified Planners (AICP)

Association of State Floodplain Managers (ASFPM)

### EMPLOYMENT HISTORY

**Boulder County Community Planning & Permitting (formerly Land Use),**  
Boulder, CO – 2017-2021. Planner I/II

**City of Harrisonburg Community Development,** Harrisonburg, VA – 2014-2017. Zoning & Planning Technician

**City of Newport News Public Works,** Newport News, VA – 2014. GIS Intern

**Draper Aden Associates,** Blacksburg, VA – 2012-2014. Environmental Team Intern/File Clerk

### GENERAL QUALIFICATIONS

Ms. Ott is a Community Planner at Dynamic Planning + Science and has seven years of local government experience in development review, project management, public engagement, and regulatory updates. Prior to working for Dynamic, Ms. Ott served as a Development Review Planner for Boulder County, Colorado, where she balanced strict regulatory processes with strong affordable housing, hazard mitigation, and environmental protection initiatives in one of the most expensive and desirable places to live in the nation. This background in local government development review, as well as previous code enforcement experience, provides valuable insight into how planning mechanisms, like General or Comprehensive Plans, are applied on a day-to-day basis.

Ms. Ott also has a passion for strategizing for and assisting with facilitation of public outreach and community and stakeholder engagement opportunities, and she communicates the intricacies of regulatory requirements clearly and concisely using language tailored for her audience. She has experience designing and facilitating public engagement processes, including virtually, and writing detailed staff reports and recommendations to various boards and commissions.

Ms. Ott prides herself on building trust and problem-solving. She is extremely detail-oriented and organized to keep projects on track and minimize time, cost, and effort. In addition, Ms. Ott enjoys finding creative solutions to complex problems for the betterment of a community as a whole, as well as the environment and natural resources upon which it is dependent.

### SELECT PROJECT EXPERIENCE

**Region 10 Housing Metadata Analysis.** *Montrose, CO.* Planning Associate.

**City of Napa Housing Element Update.** *Napa, CA.* Outreach & Planning Associate.

**City of Shasta Lake General Plan Update.** *Shasta Lake, CA.* Community Planner.

**City of Tehama General Plan Update.** *Tehama, CA.* Community Planner.

**City of Napa Housing Element Update.** *Napa, CA.* Community Planner.

**City of Delta Planning Services.** *Delta, CO.* Community Planner/Development Review Planner.

**Short-Term Dwelling Rental and Bed & Breakfast Code Update.** *Boulder County, CO.* Assisting Planner.



**Years of Experience: 10**

## EDUCATION

M.S., 2018 Geographic Information Science, University of Denver

B.S., 2010 Environmental Science, University of North Carolina at Asheville

## LICENSES/CERTIFICATIONS

GIS certificate (GISc) 2016

## PUBLICATIONS

Acknowledged – “Crafting Better Decisions” ArcUser Fall, 2009.

Co-author – C. Reed Rossell Jr. et al. *Journal of Herpetology* March 2013, Vol. 47, No. 1 pp. 66-70

## AWARDS

Herb Stout Student Award NC GIS conference 2011

## EMPLOYMENT HISTORY

**High Lonesome Ranch Sudden Aspen Decline Study**, De Beque, CO, 2011. Field Cartographer.

**National Environmental Modeling and Analysis Center**, 2007-2011. 3d modelling and flood risk data visualization. 3d visualization in urban planning. Data analysis with Bayesian Belief Network Systems. Forest management.



## Alex Krebs

GIS & Data Visualization Associate

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## GENERAL QUALIFICATIONS

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Mr. Krebs holds a Master's in Geographic Information Science. He is experienced with workflow automation development, python, spatial analysis, cartographic design, Microsoft Excel, graphics creation, JavaScript, SQL, and web applications. He has special interests in environmental relationships and the corresponding implications of human interaction and climate change

Alex has worked on projects ranging from HAZUS flood loss and earthquake damage assessments to mapping of Sudden Aspen Decline. Most of his GIS career has focused on data analysis and visualization with General Planning and FEMA Hazard Mitigation Planning processes. Project scopes require a range of skillsets including but not limited to project startup, data collection, geodatabase creation, organization, workflow development, data analysis, data summarization, web and print cartographic representation, plan content contribution, and public outreach. Alex's favorite way to contribute is through multiplatform workflow efficiency development. Alex has a Master of Geography from the University of Denver.

Mr. Krebs has been involved in projects that solve complex issues with simple solutions. These projects range from city planning to field biology and geographic statistics. His unique background and experience make him a dynamic team member. Mr. Krebs excels at filling the voids between technical application and project significance.

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## SELECT PROJECT EXPERIENCE

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**City of Napa Housing Element Update.** *Napa, CA.* GIS Associate.

**City of Shasta Lake General Plan Update.** *Shasta Lake, CA.* GIS & Data Visualization Associate.

**City of Tehama General Plan Update.** *Tehama, CA.* GIS & Data Visualization Associate.

**City of Napa Housing Element Update.** *Napa, CA.* GIS & Data Visualization Associate.

**City of Isleton General Plan Update.** *City of Isleton, CA.* GIS & Data Visualization Associate.

**San Juan Basin Health.** *La Plata County, CO.* GIS data development and web application implementation.

**Delta County Hazard Mitigation Plan Update.** *Delta County, CO.* GIS/Data Specialist.