

CONTRACT FOR GOODS AND/OR SERVICES

THIS AGREEMENT ("Agreement"), made this ____ day of _____, 20__, between the Town of Frisco, a Colorado home rule municipal corporation, hereinafter referred to as "FRISCO" and Dynamic Planning + Science, a Limited Liability Company, as an independent contractor, hereinafter referred to as "CONTRACTOR," provides as follows:

ARTICLE I **SCOPE OF SERVICES**

Section 1.1 Services: CONTRACTOR agrees to perform the work, personal services and/or furnish the necessary equipment, supplies or materials in accordance with and/or as described in Attachment A hereto, hereinafter referred to as the "Project" or the "Scope of Services." Attachment A hereto is hereby incorporated by reference and made a part of this Agreement.

Section 1.2 Scope of Services: FRISCO agrees to retain CONTRACTOR to complete the Project. CONTRACTOR shall commence work upon direction to proceed and complete the Project on or before July 1, 2024. Additional services beyond those listed in Attachment A, if requested, shall be provided only when authorized in writing by FRISCO.

Section 1.3 Independent Contractor: CONTRACTOR shall at all times control the means and manner by which CONTRACTOR performs the work, subject to FRISCO's right to monitor, evaluate and improve such work. CONTRACTOR shall at all times be and act as an independent contractor and not as an employee of FRISCO.

Section 1.4 Warranty of Contractor: CONTRACTOR warrants that title to all services, materials and equipment covered and paid for under this Agreement will pass to FRISCO either by incorporation in the Project or upon the receipt of payment by CONTRACTOR, whichever occurs first, free and clear of all liens, claims, security interests or encumbrances; and that no services, materials or equipment paid for under this Agreement will have been acquired by CONTRACTOR, or by any other person performing services at the site or furnishing materials and equipment for the Project, subject to an agreement under which an interest therein or an encumbrance thereon is retained by the seller or otherwise imposed by CONTRACTOR or such other person.

ARTICLE II **ADMINISTRATION OF THIS AGREEMENT**

Section 2.1 Project Performance: In consideration of the compensation provided for in this Agreement, CONTRACTOR agrees to perform or supply the Project, in accordance with generally accepted standards and practices of the industry, and warrants all materials incorporated in the Project to be free from defect of material or

workmanship and conform strictly to the specifications, drawings or samples specified or furnished. This Section 2.1 shall survive any inspection, delivery, acceptance or payment by FRISCO.

Section 2.2 Oversight: All of the work associated with the Project shall be performed under the direction of James Gorham, Housing Programs Specialist; it is expressly understood and agreed that some of the work may have commenced prior to the formal execution of this Agreement, in which event such work is incorporated into the Project and is deemed to have been and is authorized by this Agreement.

Section 2.3 Ownership and Use of Documents:

(a) Any documents prepared by CONTRACTOR, and copies thereof furnished to other parties are for use solely with respect to this Project. They are not to be used by any other contractor or subcontractor on other projects or for additions to this Project outside the scope of the work without the specific written consent of FRISCO. Other contractors and subcontractors are authorized to use and reproduce applicable portions of the documents prepared by the CONTRACTOR appropriate to and for use in the execution of their work under this Agreement. All copies made under this authorization shall bear the statutory copyright notice, if any, shown on the documents prepared by CONTRACTOR.

(b) CONTRACTOR, and any subcontractor or supplier or other person or organization performing or furnishing any work for the Project under a direct or indirect contract with FRISCO (i) shall not have or acquire any title to or ownership rights in any of any documents (or copies of documents) prepared in connection with the Project by a design professional and (ii) shall not reuse any of such documents or copies for extensions of the Project or any other project without written consent of FRISCO and the design professional and specific written verification or adaption by the design professional.

(c) Notwithstanding the provisions of Sections 2.3(a) and (b) above, FRISCO reserves the right to utilize any documents generated in connection with the Project by CONTRACTOR for other projects, provided that CONTRACTOR is not held liable for future project applications other than the Project described pursuant to this Agreement. FRISCO shall not convey any such documents generated by CONTRACTOR to a third party or use any such documents in a manner adverse to the CONTRACTOR.

Section 2.4 Insurance:

(a) CONTRACTOR agrees to procure and maintain, at its own cost, the following policy or policies of insurance sufficient to insure against all liability, claims, demands, and other obligations assumed by CONTRACTOR under this Agreement or arising as a result of this Agreement. Such insurance shall be in addition to any other insurance requirements imposed by this Agreement or by law.

(b) Commercial General Liability insurance with minimum combined single limits of ONE MILLION DOLLARS (\$1,000,000) each occurrence and TWO MILLION DOLLARS (\$2,000,000) aggregate. The policy shall be applicable to all premises and operations. The policy shall include coverage for bodily injury, broad form property damage (including completed operations), personal injury (including coverage for contractual and employee acts), blanket contractual, independent contractors, products, and completed operations. The policy shall name FRISCO, its employees and agents as additional insureds and shall include the following provisions: (i) severability of interest; (ii) waiver of subrogation; and (iii) cross liability endorsement.

(c) Workers' Compensation insurance to cover obligations imposed by applicable laws for any employee engaged in the performance of work under this Agreement, and Employers' Liability insurance with minimum limits of SIX HUNDRED THOUSAND DOLLARS (\$600,000) each accident, SIX HUNDRED THOUSAND DOLLARS (\$600,000) disease - policy limit, and SIX HUNDRED THOUSAND DOLLARS (\$600,000) disease - each employee. Evidence of qualified self-insured status may be substituted for the Workers' Compensation requirements of this Section 2.4(c).

(d) Comprehensive Automobile Liability insurance with minimum combined single limits for bodily injury and property damage of not less than ONE MILLION DOLLARS (\$1,000,000) each occurrence and ONE MILLION DOLLARS (\$1,000,000) aggregate with respect to each of CONTRACTOR's owned, hired and non-owned vehicles assigned to or used in performance of the services. The policy shall contain a severability of interests provision. If CONTRACTOR has no owned automobiles, the requirements of this Section 2.4(d) shall be met by each employee of CONTRACTOR providing services to FRISCO under this Agreement.

(e) The insurance policies required by Sections 2.4(a), (b) and (d) shall name FRISCO, its employees and agents as additional insureds. No additional insured endorsement to a policy shall contain any exclusion for bodily injury or property damage arising from completed operations.

(f) Every policy required under this Section 2.4 shall be primary insurance, and any insurance carried by FRISCO, its officers, or its employees, or carried by or provided through any insurance pool of FRISCO, shall be excess and not contributory insurance to that provided by CONTRACTOR. CONTRACTOR shall be solely responsible for any deductible losses under any policy required above. Any insurance policy required under this Agreement shall be written by a responsible company.

(g) Prior to commencement of this Agreement, CONTRACTOR shall provide FRISCO with a certificate of insurance completed by CONTRACTOR's insurer as evidence that policies providing the required coverage, conditions and minimum limits are in full force and effect. The certificate shall identify this Agreement and shall provide

that the coverage afforded under the policies shall not be canceled, terminated or materially changed until at least thirty (30) days' prior written notice has been given to FRISCO. The completed certificate of insurance shall be sent to:

Town of Frisco
P.O. Box 4100
Frisco, Colorado 80443
Attn: James Gorham

(h) CONTRACTOR shall not be relieved of any liability, claims, demands, or other obligations assumed pursuant to this Agreement by reason of CONTRACTOR's failure to procure or maintain insurance, or by reason of its failure to procure or maintain insurance in sufficient amount, duration or type. Failure on the part of CONTRACTOR to procure or maintain policies providing the required coverage, conditions and minimum limits shall constitute a material breach of contract upon which FRISCO may immediately terminate this Agreement, or at its discretion FRISCO may procure or renew any such policy or any extended reporting period thereto and may pay any and all premiums in connection therewith, and all monies so paid by FRISCO shall be repaid by CONTRACTOR to FRISCO upon demand, or FRISCO may withhold the cost of the premiums from any monies due to CONTRACTOR from FRISCO.

(i) The parties hereto understand and agree that FRISCO is relying on, and does not waive or intend to waive by any provision of this Agreement, the monetary limitations or any other rights, immunities, and protections provided by the Colorado Governmental Immunity Act, §§ 24-10-101 *et seq.*, C.R.S., as from time to time amended, or otherwise available to FRISCO, its officers, or its employees.

Section 2.5 Indemnification:

(a) CONTRACTOR shall indemnify and hold harmless FRISCO and its agents and employees from and against all claims, damages, losses and expenses, including but not limited to attorneys' fees, arising out of or resulting from this Agreement, provided that any such claim, damage, loss or expense (1) is attributable to copyright infringement, bodily injury, sickness, disease or death, or to injury to or destruction of tangible property including the loss of use resulting therefrom, and (2) is caused in whole or in part by any negligent act or omission of CONTRACTOR, any subcontractor of CONTRACTOR, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable. Such obligation shall not be construed to negate, abridge or otherwise reduce any other right or obligation of indemnity that would otherwise exist as to any person described in this Section 2.5(a).

(b) In any and all claims against FRISCO or any of its agents or employees by any employee of CONTRACTOR, any subcontractor of CONTRACTOR, anyone directly or indirectly employed by any of them or anyone for whose act any of them may be liable, the indemnification obligation under this Section 2.5 shall not be limited in any way by any limitation on the amount or type of damages, compensation or

benefits payable by or for CONTRACTOR or any subcontractor under worker's or workman's compensation actions, disability benefit acts or other employee benefit acts.

Section 2.6 Subcontractor: CONTRACTOR shall, as soon as practicable after the signing of this Agreement, notify FRISCO in writing for FRISCO's approval, of any subcontractors who may be involved in the Project and the general scope of work to be performed by each subcontractor.

Section 2.7 Termination of Agreement:

(a) This Agreement shall terminate: (a) at such time as the work described in the Scope of Services is completed and the requirements of this Agreement are satisfied, (b) on November 1, 2024, or (c) upon FRISCO providing CONTRACTOR with seven (7) days advance written notice, whichever occurs first. After termination, FRISCO shall pay CONTRACTOR for all work previously authorized and completed prior to the date of termination. If, however, CONTRACTOR has substantially or materially breached this Agreement, FRISCO shall have any remedy or right of set-off available at law and equity. If this Agreement is terminated for any reason other than cause prior to completion of the Scope of Services, any use of documents by FRISCO thereafter shall be at FRISCO's sole risk, unless otherwise consented to by CONTRACTOR. This Agreement may be terminated by CONTRACTOR upon thirty (30) days' written notice, provided that such termination is based upon a substantial failure by FRISCO to perform in accordance with the terms in this Agreement. In the event of such termination, FRISCO will pay CONTRACTOR for all services performed to date of termination. If payment is otherwise due upon completion, FRISCO will pay CONTRACTOR for the pro rata value of the completed portion of the Project that will be incorporated into the Project. FRISCO will require the release of all lien rights as a condition of such payment.

(b) Nothing herein shall constitute a multiple fiscal year obligation pursuant to Colorado Constitution Article X, Section 20. Notwithstanding any other provision of this Agreement, FRISCO's obligations under this Agreement are subject to annual appropriation by the Town Council of FRISCO. Any failure of a Town Council annually to appropriate adequate monies to finance FRISCO's obligations under this Agreement shall terminate this Agreement at such time as such then-existing appropriations are to be depleted. Notice shall be given promptly to CONTRACTOR of any failure to appropriate such adequate monies.

Section 2.8 Binding Effect: FRISCO and CONTRACTOR each bind itself, its successors and assigns to the other party to this Agreement with respect to all rights and obligations under this Agreement. Neither FRISCO nor CONTRACTOR shall assign or transfer its interest in this Agreement without the written consent of the other.

Section 2.9 Notice and Communications: Any notice to the parties required under this Agreement shall be in writing, delivered to the person designated below for the parties at the indicated address unless otherwise designated in writing. Only mailing by

United States mail or hand-delivery shall be utilized. Facsimile and/or e-mail addresses are provided for convenience only.

FRISCO:

Town of Frisco
P.O. Box 4100
Frisco, Colorado 80443
Attn: James Gorham
Electronic mail: JamesG@townoffrisco.com

CONTRACTOR:

Dynamic Planning + Science
19235 Highway 550
Montrose, CO 81403
Attn: Ethan Mobley
Electronic mail: ethan@dynamicplanning.co

ARTICLE III
RESPONSIBILITIES OF FRISCO

Section 3.1 Project Materials: FRISCO shall make available data related to the Project, including design specifications, drawings and other necessary information. Data so furnished to CONTRACTOR shall be furnished at no cost, and shall be returned to FRISCO at the earliest possible time.

Section 3.2 Access to Property and Records: FRISCO shall provide CONTRACTOR with access to public property as required and necessary to complete the contract. To the extent required by law, FRISCO and CONTRACTOR agree to make this Agreement and any related records available for public disclosure pursuant to any open records law, including, without limitation, the Colorado Open Records Act, C.R.S. §§ 24-72-101, *et seq.* CONTRACTOR agrees to hold FRISCO harmless from the disclosure of any records that FRISCO reasonably believes it is legally required to disclose.

Section 3.3 FRISCO's Representative: FRISCO shall designate, in writing, a representative who shall have authority to act for FRISCO with respect to the services to be rendered under this Agreement. Such person shall have complete authority to transmit instructions, receive information, interpret and define FRISCO's policies and decisions with respect to materials, equipment, elements and systems pertinent to CONTRACTOR's services.

Section 3.4 Verbal Agreement or Conversation: No verbal agreement or conversation with any officer, agent or employee of FRISCO, either before, during or after the execution of this Agreement, shall affect or modify any of the terms or obligations herein contained, nor shall such verbal agreement or conversation entitle CONTRACTOR to any additional payment whatsoever under the terms of this Agreement.

ARTICLE IV
COMPENSATION FOR SERVICES

Section 4.1 Compensation: CONTRACTOR shall be compensated for services as described in Attachment B hereto. Attachment B hereto is hereby incorporated by reference and made a part of this Agreement.

Section 4.2 Payment: FRISCO shall pay CONTRACTOR monies due under this Agreement within thirty (30) days after invoice date, provided such amounts are not in dispute or the subject of setoff.

ARTICLE V MISCELLANEOUS

Section 5.1 Colorado Law: This Agreement is to be governed by the laws of the State of Colorado.

Section 5.2 Amendments; Change Orders: This Agreement may only be amended, supplemented or modified in a written document signed by both parties.

Section 5.3 Counterparts: This Agreement may be executed in two or more counterparts, using manual or facsimile signature, each of which shall be deemed an original and all of which together shall constitute one and the same document.

Section 5.4 No Third Party Benefit: This Agreement is between FRISCO and CONTRACTOR and no other person or organization shall be entitled to enforce any of its provisions or have any right under this Agreement.

IN WITNESS WHEREOF, the parties hereto have signed and executed this Agreement the day first written above.

FRISCO

By: _____

Name: Hunter Mortensen

Title: Mayor

Attest:

Stacey Nell, Town Clerk

CONTRACTOR

By: _____

Name: _____

Title: _____

ATTACHMENT A

SCOPE OF WORK

Project Scope

The scope of work will include, at a minimum, the following tasks:

Task 1: Identify Goals and Objectives

- Identify the goals, objectives, and success measures of workforce housing in Frisco. This will include a combination of community outreach efforts, staff interaction and Town Council work sessions.

Task 2: Frisco Housing Needs Assessment

- Review the 2018 Town of Frisco Housing Task Force Report (Attachment 4) that was created as a dynamic and comprehensive approach to addressing affordable housing in Frisco. Utilize this report as a starting point for analysis and review.
- Extrapolate data from the 2023 Summit County Housing Needs Assessment specific to Frisco and complete a Frisco Housing Needs Assessment.
- Evaluate population and demographic trends in Frisco including, but not limited to population, age, race/ethnicity, employment, workforce, seasonal influence on the work force, income levels, and number of residents who are cost burdened by the housing costs.
- Analyze Current Conditions.
 - o Evaluate the housing stock of Frisco including number of homes, housing types, rentals vs. ownership, vacancies, special housing needs (such as people with disabilities, seniors, homelessness, non-English speakers), and number and type of deed restricted units. Include planned and approved residential projects in this evaluation.
 - o Evaluate current home prices for ownership and rental rates.
 - o Evaluate data that answers how much of our housing stock is lived in full time, short term or is short term rented.
 - o Inventory land suitable for residential development, including vacant sites and potential redevelopment sites.
- Identify housing needs and gaps for the local workforce over the next five (5) years.
- Work to proposed solutions to create a balance between existing housing teardowns and new residential infill development.

- Identify product types needed including, but not limited to housing types, sizes, bed and bath numbers, amenities, parking, sale/rental, costs, etc.

Task 3: Frisco Strategic Housing Plan

The Town of Frisco does not have a formalized or adopted Strategic Housing Action Plan. However, there are several workforce housing programs in effect. The scope of work for this task includes the review and evaluation of existing Frisco workforce housing programs including but not limited to:

- Housing Helps
- Land Purchases
- Current and Future Housing Projects
- State Grants and Financing Programs
- Code Revisions
- Property Purchases
- Home Improvement Loan Program
- Extraterritorial Water Agreements
- Deed Restrictions. Review current deed restrictions in Frisco and compare these covenants to other deed restrictions in Summit County. Collect and thoroughly review the covenants associated with each of the deed restrictions.
 - o How do each of the deed restrictions work?
 - o Breakdown the covenants into terms that are simple to understand.
 - o Analyze the resale calculation of existing covenants. Provide a matrix to help understand this breakdown for each of the different covenants.
 - o Review turnover and sale of deed restricted units in Frisco in the last 5 years

The consultant will be expected to review these programs and collectively include them in a formalized plan. The consultant will be expected to propose changes or additional strategies to address the identified need for workforce housing in Frisco. By completing the Frisco Housing Needs Assessment in Task 2, the consultant will be well positioned to create this strategic housing plan. The scope of work for this housing plan also includes:

- Evaluation of the 2019 Frisco Community Plan
- Evaluation of existing buildout models for water, sanitation, etc.
- Evaluation of existing density levels
- Conducting public engagement meetings with the Frisco community, also known as “Community Conversations”
- Proposing regulatory changes that could incentivize private developers to build workforce housing.

Task 4: Buildout Model + Scenario Planning

- Create an interactive buildout model for Frisco to predict potential residential capacity growth. Use this data model to simulate alternative housing development scenarios. This 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.

- Create financial models to identify private/public partnerships and local, state, and federal funding sources as most appropriate.
- Provide recommendations on how to manage the growth in Frisco, including but not limited to changes with zoning, taxation, etc.
- Analyze the goal of 50% of the housing units in Frisco occupied by year-round residents.
 - o Is this an appropriate goal and why or why not?
 - o If 50% of the housing units are occupied by year-round residents, what does this mean for the other 50% of the housing units in Frisco?
 - o Is this goal consistent with the housing needs assessment for Frisco?
- Include in this analysis work force housing projects currently under review and/or development, including the proposed Lake Hill project:
 - o In 2016, Summit County acquired a 44.81-acre parcel on the Dillon Dam Road from the United States Forest Service (USFS) with the intent to build affordable workforce housing in this desirable central location. This project is known as Lake Hill. Lake Hill is currently proposed as a 436 units development with 367 multi-family units, 16 duplex units and 53 townhomes and a combination of ownership and rental units. The County has proposed to partner with the Town of Frisco on this project, particularly on water service needs.
 - o In the analysis, include scenarios with the construction of Lake Hill and without the construction of Lake Hill.

ATTACHMENT B

COMPENSATION

Town of Frisco
Housing Needs Assessment and Strategic
Housing Action Plan
**Adjusted Cost
Schedule**

Town of Frisco Housing Needs Assessment and Strategic Housing Action Plan Adjusted Cost Schedule	Dynamic Planning + Science						Subconsultants						GRAND TOTAL	
	Ethan Mobley Principal \$165/hr	Brian Greer Data Viz. \$185/hr	Raini Ott Planner \$110/hr	Alex Krebs Data Viz. Assoc \$100/hr	SUBTOTAL Hours	SUBTOTAL Cost	Triple Point \$185/hr	Western Spaces \$165/hr	Castlewood Community Capital \$185/hr	SUBTOTAL Hours	SUBTOTAL Cost	TOTAL Hours	TOTAL 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	40 38	8 4	40 2	0	38 48	\$ 5,530 \$ 6,240	8 4	10 4	4 2	20 38	\$ 3,200 \$ 5,660	100 148	\$ 15,250 \$ 15,910	
Task 2. Housing Needs Assessment	20	40	80 22	10	140 50	\$ 18,420 \$ 19,300	10 40	80	4 2	92 104	\$ 15,060 \$ 16,020	232 194	\$ 33,310 \$ 34,340	
Task 3. Buildout Model & Scenario Planning	20	80	40	10	150	\$ 21,100	100	20	80	200	\$ 31,200	350	\$ 62,300	
Capacity Planning	10	4	10	10	34	\$ 4,370	0	6	0	6	\$ 990	40	\$ 5,360	
Sites Inventory	2	60	4	0	66	\$ 10,070	0	2	0	2	\$ 330	68	\$ 10,400	
Economic Impacts	2	0	2	0	4	\$ 550	100	2	0	102	\$ 15,830	106	\$ 16,380	
Financial Models	2	0	2	0	4	\$ 550	0	2	80	82	\$ 12,730	86	\$ 13,280	
Growth Scenarios	4	16	22	0	42	\$ 5,560	0	8	0	8	\$ 1,320	50	\$ 6,880	
Task 4. Strategic Housing Plan	33	26	40 74	10	149	\$ 18,615 \$ 19,276	40	160	10	210	\$ 30,870 \$ 34,150	133 189	\$ 14,460 \$ 18,336	
Stakeholder Coordination	4	4	20	10	38	\$ 4,480	8	4 26	0	6 43	\$ 7,015 \$ 9,160	94	\$ 13,640	
Strategy Identification and Refinement	4	4	8	0	16	\$ 2,160	0	30	0	30	\$ 4,950	46	\$ 7,110	
Draft Plan Development	13	4	12	0	29	\$ 4,085	16	22	8	46	\$ 7,350	75	\$ 11,435	
Community Outreach	6	6	12 6	0	18 24	\$ 2,580 \$ 3,240	8	4 26	0	22 38	\$ 3,570 \$ 4,190	30 66	\$ 9,130 \$ 10,436	
Public Open House	4	4	8 4	0	12 16	\$ 1,720 \$ 2,160	4	18 8	0	12 22	\$ 1,940 \$ 2,500	24 38	\$ 5,160 \$ 6,666	
Town Council Work Session	2	2	42	0	4 46	\$ 850 \$ 4,090	4 2	4 26	0	10 46	\$ 1,630 \$ 2,600	10 56	\$ 2,130 \$ 8,696	
Final Plan Production	6	8	28	0	42	\$ 5,310	8	4 26	2	28 40	\$ 4,520 \$ 4,600	70 80	\$ 11,130 \$ 9,906	
Final Plan Editing	4	4	24	0	32	\$ 3,920	4	10	2	16	\$ 2,580	48	\$ 6,500	
Final Presentation(s)	2	4	4	0	10	\$ 1,300	4	2 26	0	24 12	\$ 2,580 \$ 3,020	30 46	\$ 4,600 \$ 4,596	
ODC - Meeting Travel / Printing / ODC						\$ 2,025					\$ 2,000		\$ 4,025	
ODC - IMPLAN License						\$ 3,500					\$ -		\$ 3,500	
Project Totals	13143	16464	198220	3030	522847	\$77,340	16048	235274	98002	493864	\$80,765	1016111	\$158,105	
						\$80,090					\$-92,160		\$172,250	

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 29th, 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

Town of Frisco

Housing Needs Assessment and Strategic Housing Action Plan

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.

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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Town of Frisco

Housing Needs Assessment and Strategic Housing Action Plan

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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](http://dynamicplanning.co/frisco/)¹.

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

¹ <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
Dynamic Planning + Science (Prime)				
Ethan Mobley	Owner	Montrose, CO	970-323-4331	ethan@dynamicplanning.co
Brian Greer	Co-Owner	Concord, CA	510-523-4331	brian@dynamicplanning.co
Triple Point Strategic Consulting (Subconsultant)				
Jeff Moffett	Owner	Crested Butte, CO	970-275-1906	jmoffett@tpsconsulting.net
Western Spaces, LLC (Subconsultant)				
Sarah Brown McClain	Owner	Frisco, CO	970-275-3154	sarah@westernspaces.co
Castlewood Community Capital (Subconsultant)				
Michael Leahey	Owner	Leadville, CO	303-720-5663	michael@castlewood-capital.com

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

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
970-249-2436 Direct
145 S. Cascade Ave. Montrose, CO 81401

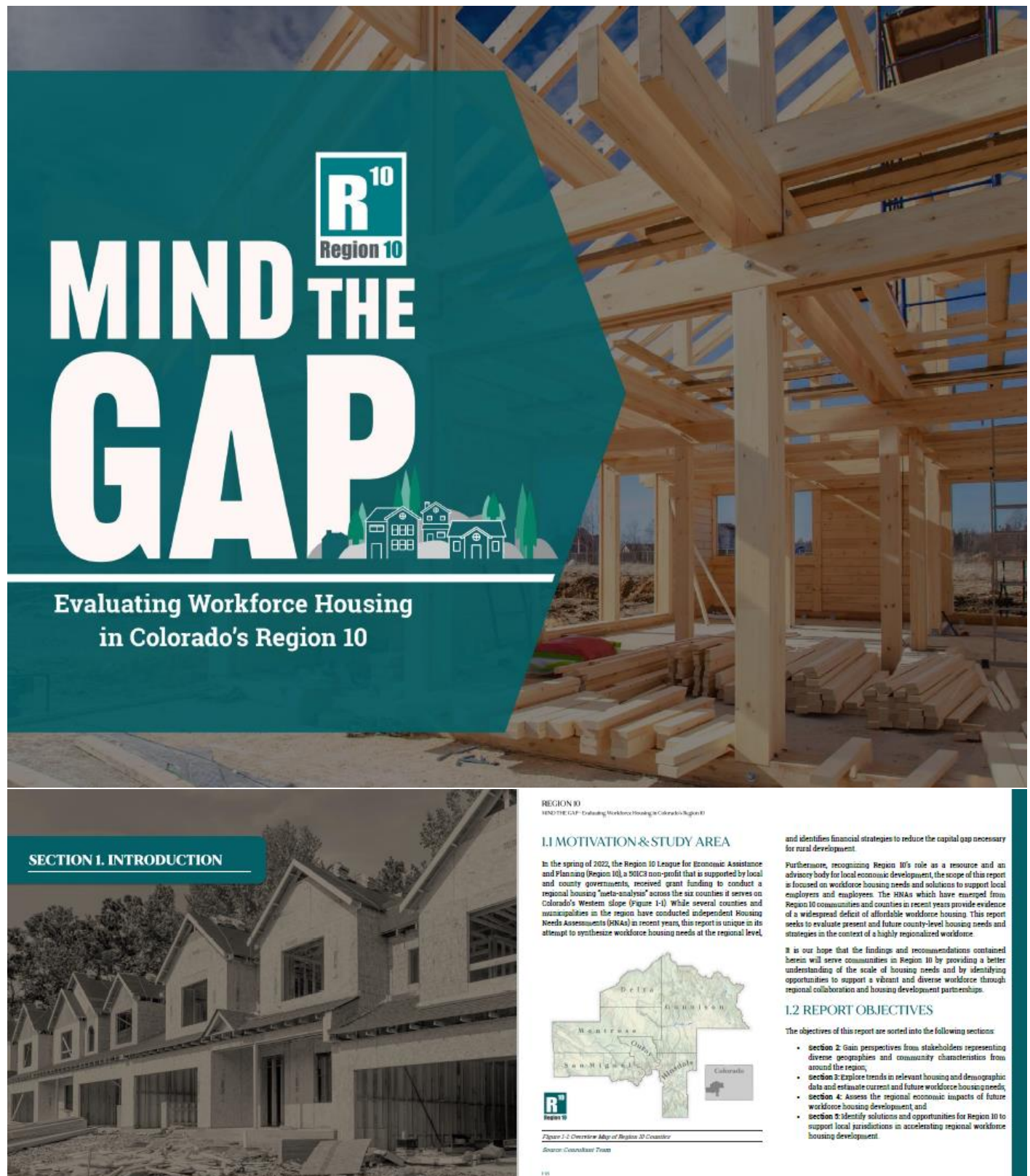


Figure 1: Example work Mind the Gap Report for Region 10

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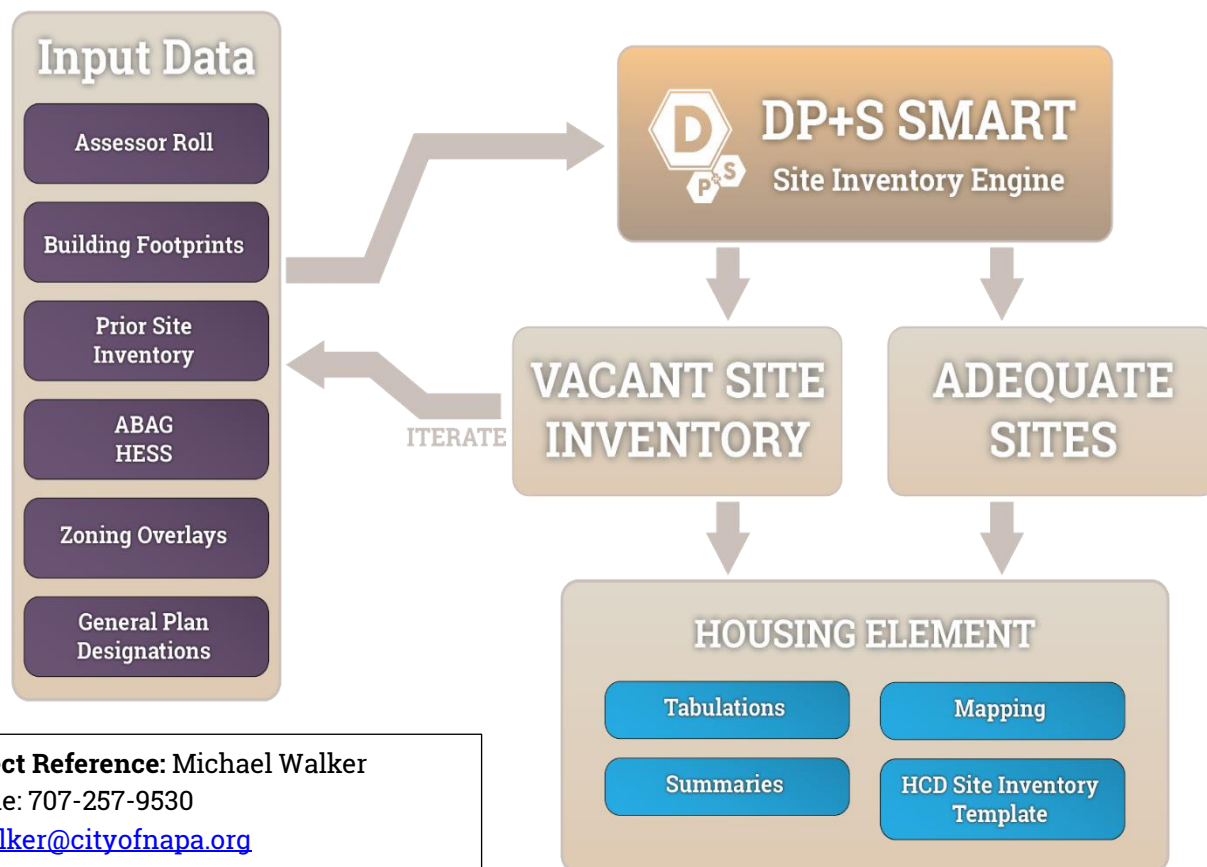
City of Napa, CA 2023 Housing Element Update (Dynamic Planning + Science)

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

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

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

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

970-368-1008

CORTEZ HOUSING POLICY UPDATE

VIRTUAL HOUSING COMMITTEE WORK SESSIONS AND PUBLIC OUTREACH

Agenda

2:00 - 2:15	Welcome and Purpose (10 minutes)
2:15 - 2:20	Existing Goals and Objectives (30 minutes)
2:20 - 3:00	Income Targeting and Pricing (20 minutes)
3:00 - 3:20	Number of Units to be Developed (20 minutes)
3:20 - 3:30	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 7th (?)
Public Open House	Feedback on Policy Priorities and Goals	June 12th
Joint Council and PBZ Worksession	Feedback on Policy Priorities and Goals	June 13th
Housing Committee Meeting #3	Finalize Action Plan	TBD
Presentation to PBZ	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)
Total Catch-up Housing Units	75	175
New jobs (0.78% avg. growth/year)	140	240
Retiring employees (3% of jobs)	70	120
Total Keep-up Housing Units	210	360
Catch-up and Keep-up through 2028	285	535

SOURCE: CONSULTANT TEAM

Goal: Income Targeting and Pricing

Cortez Housing Bridge



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:
rmarchbanks@cortezco.gov
970-564-4068

CORTEZ LAND USE CODE & HOUSING POLICY UPDATE
PUBLIC COMMENT PERIOD

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.

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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 in summary of our general approach and project management methods, followed by a detailed scope of services.

TASK 1: IDENTIFY GOALS AND OBJECTIVES

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

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)

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)

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

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

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.

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.

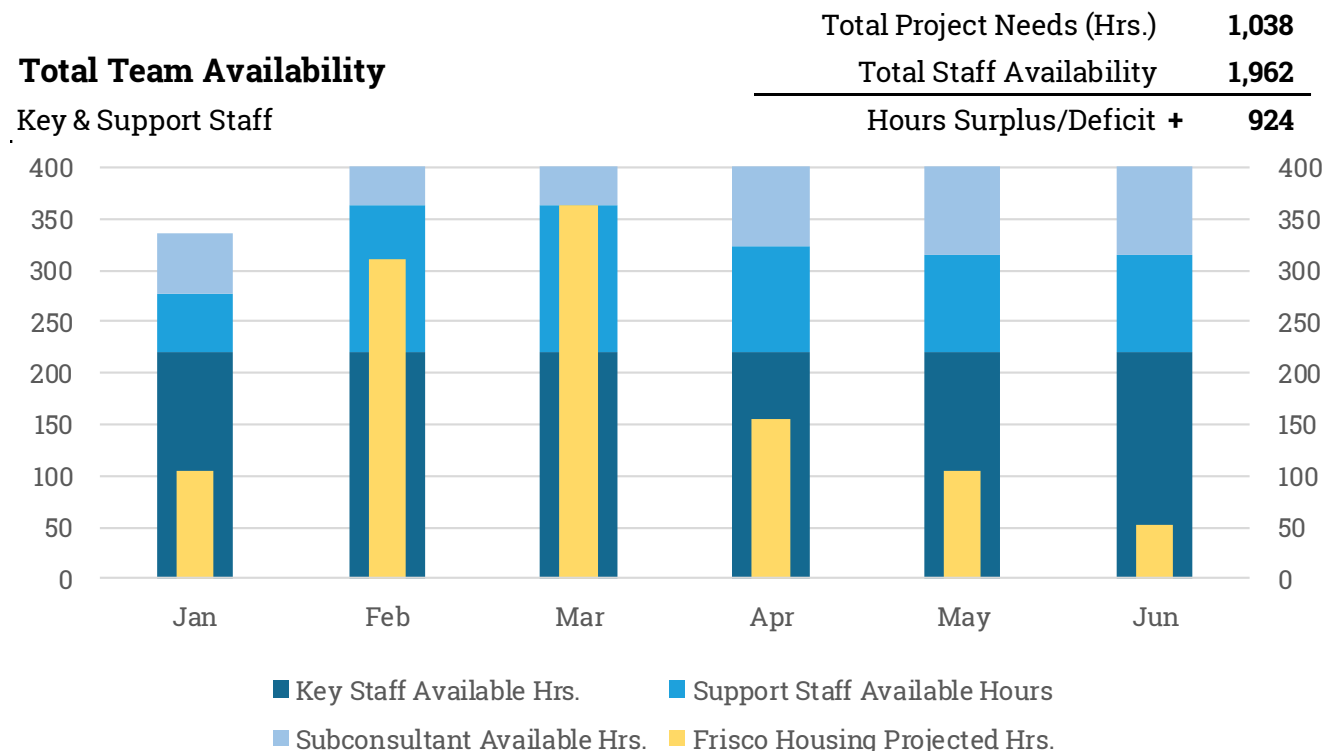


Figure 3: Projected Staff Availability

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

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

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

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

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

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

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

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

- 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

- 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

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

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

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

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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

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

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

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

CLIENT INVOLVEMENT

- 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

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

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

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 is 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

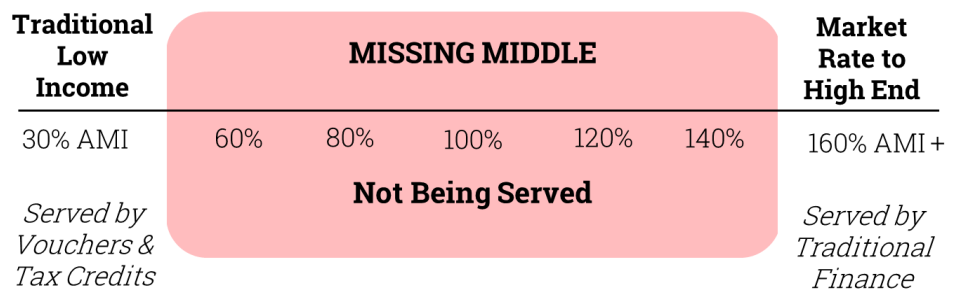


Figure 4: Illustration of the "Missing Middle"

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.

Town of Frisco

Housing Needs Assessment and Strategic Housing Action Plan

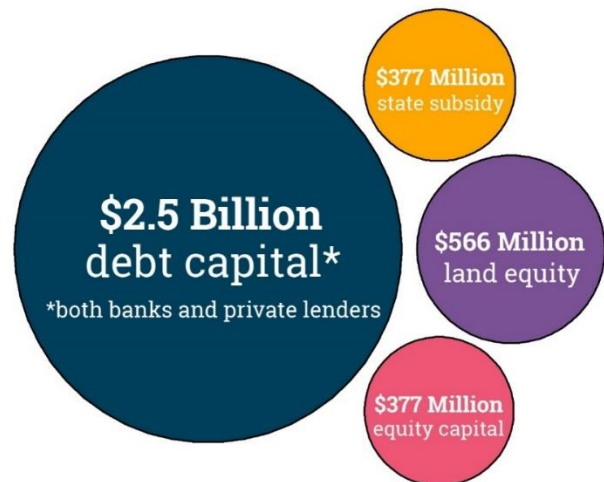
The guiding principle in real estate proforma modeling is that the cost of a project, or the “use of funds”, must equal the financing for the project, or the “source of funds.” For modeling purposes, the use of funds tends to fall into five categories:

- 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

Figure 5: Required Capital from Example Project

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 partnerships² and special limited partnerships³ 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 outlined in the RFP:

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.

² 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.

³ 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

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

CLIENT INVOLVEMENT

- 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

COMPONENTS OF THE STRATEGIC HOUSING PLAN

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

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

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

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

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.

COMMUNITY OUTREACH

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)

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

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

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										

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

Town of Frisco Housing Needs Assessment and Strategic Housing Action Plan Cost Estimate	<div><div><div>D</div><div>P</div><div>S</div></div>Dynamic Planning + Science</div>						Subconsultants				GRAND TOTAL		
	Ethan Mobley Principal	Brian Greer Data Viz.	Raini Ott Planner	Alex Krebs Data Viz. Assoc			Triple Point	Western Spaces	Castlewood Capital			HOURS	COST
					SUBTOTAL					SUBTOTAL			
	\$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	
Project Totals	120	178	220	30	548	\$ 80,090	188	284	102	574	\$ 93,810	1122	\$ 173,900

APPENDIX A. STAFF RESUMES

Please find full project team resumes on the following pages.



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



Ethan E. Mobley, AICP

Project Manager | Owner

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 a 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

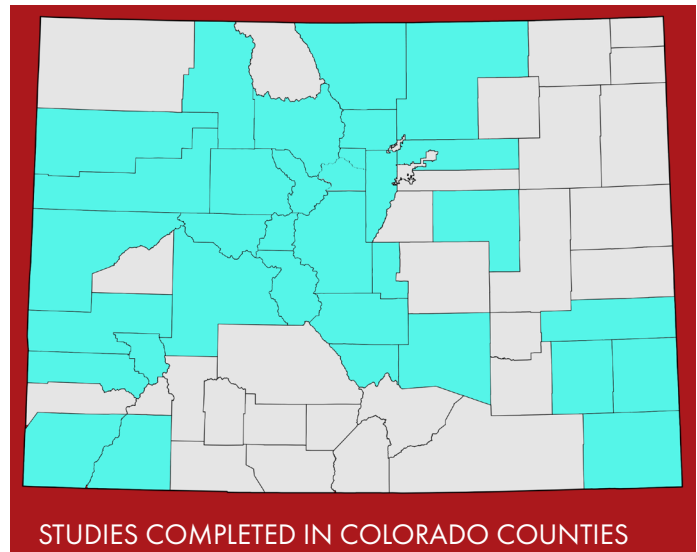
Our unique approach is built on three pillars: understanding the past, navigating the present, and planning for the future. We specialize in crafting diverse and thriving communities where residents and visitors can flourish together. Our data-driven insights, combined with our strategic thinking, enable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

(303) 720-5663



CORE COMPETENCIES

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

EDUCATION

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

EXPERIENCE

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

OTHER EXPERIENCE, SKILLS, AND TRAINING

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
(303) 720-5663



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



Jean Lorraine "Raini" Ott

Community Planner | She/Her

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

GENERAL QUALIFICATIONS

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.

SELECT PROJECT EXPERIENCE

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.



Frisco Housing Needs Assessment Cost Justification and Cost Change Memorandum

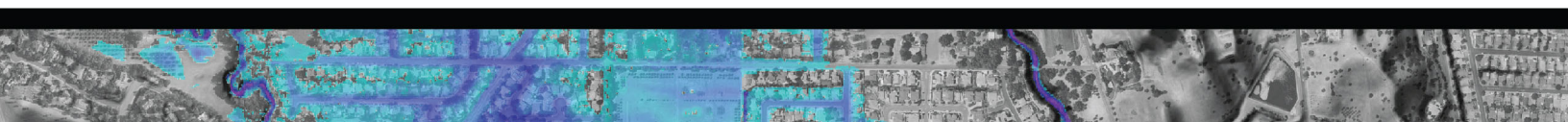
To:	James Gorham
From:	Ethan Mobley, Owner, Dynamic Planning, LLC.
CC:	Katie Kent
Date:	12/12/2023
Subject:	Town of Frisco Housing Needs Assessment and Strategic Housing Action Plan Proposal Follow-up

Background

The Town of Frisco is currently engaged in a crucial initiative – the Housing Needs Assessment and Strategic Housing Action Plan. According to your request, a key component of this initiative is the creation of a detailed buildout model and scenario planning. Given the complexity and significance of this task, a specialized team of consultants has been assembled to assist.

Justification for Consultant Cost

- Expertise in Specialized Field:** Buildout modeling requires a distinct set of skills, encompassing areas such as urban planning, demographic analysis, and economic forecasting. The Consultant Team assembled for the proposal brings specialized expertise and experience that is not typically found within other consultant firms across Colorado.
- Comprehensive and Accurate Analysis:** The Consultant Team's role will include extrapolating data specific to the Town of Frisco from the 2023 Summit County Housing Needs Assessment, evaluating the Town's population and demographic trends, and analyzing current housing conditions and trends. The level of detail and the time involved in conducting an accurate analysis as proposed for the Town are crucial for laying the groundwork of an effective strategic plan.
- Efficiency and Time-Saving:** Engaging with our team of experts will expedite the process significantly. The Consultant Team's dedicated focus and specialized tools enable faster completion of the buildout model, which is critical given the project's tight timeline.
- Objective and Unbiased Perspective:** An external Consultant Team provides an objective viewpoint, free from internal biases or influences. This objectivity is vital in ensuring that the strategies and recommendations developed are in the best interest of the Town and its residents.
- Cost-Effectiveness in the Long-Term:** While the upfront cost of a consultant may seem high, it is cost-effective in the long run. The insights and strategies provided will guide efficient allocation of resources and investments, potentially saving a significant amount of money for the Town over time.





6. **Compliance with RFP Requirements:** The Request for Proposals (RFP) for the Housing Needs Assessment explicitly outlines the need for such expertise. The Consultant Team's work will ensure that the project aligns with these stipulated requirements.
7. **Support in Policy Formulation:** The Consultant Team will aid in proposing regulatory changes and identifying potential public/private partnerships, funding sources, and other potential housing resources available to the Town for plan implementation. This support is essential in formulating policies that are both innovative and practical.
8. **Risk Mitigation:** Given the Consultant Team's experience and expertise, the risk of inaccuracies or oversights in the buildout model is significantly reduced. This risk mitigation is highly valuable to planning and policy formulation that will lead the Town into its envisioned future.

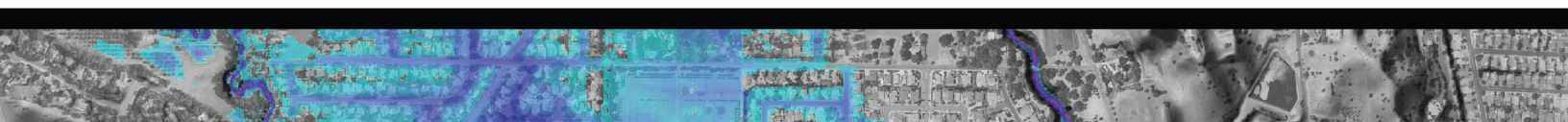
The engagement of a specialized consultant for the buildout modeling in the Housing Needs Assessment and Strategic Housing Action Plan is not only a strategic decision but a necessary one. It ensures that the Town of Frisco has access to the highest level of expertise, leading to informed, effective, and efficient planning and policy development. This investment will undoubtedly yield significant benefits for the Town and its residents in the long term.

Cost Cutting Measures:

As requested by Town staff, we implemented cost-cutting measures to our scope of work. Primarily, our Consultant Team proposes consolidating Tasks in our RFP approach and combining the public outreach efforts with the 2024 Frisco Comprehensive Plan RFP to implement a multi-faceted and integrated strategy. This approach ensures that all efforts are aligned and mutually reinforcing, leading to more comprehensive and efficient outcomes. This consolidation is aimed at optimizing the project's budget while ensuring that the core objectives are met effectively. Below is a suggested strategy followed by cost schedule edits.

Proposed Approaches for Consolidation

1. **Integrated Planning and Goal Setting:**
 - **Consolidate Goals and Objectives:** Begin by integrating the goal-setting process of Task 1 with the strategic housing planning from Task 4. Ensure these goals also align with the broader objectives of the Comprehensive Plan.
 - **Inclusive Stakeholder Engagement:** Involve a wide range of stakeholders in the goal-setting process, including residents, businesses, community organizations, and Town officials. This inclusive approach should also cater to the broader objectives of the Comprehensive Plan.
2. **Unified Public Outreach and Engagement:**
 - **Joint Public Workshops and Meetings:** Organize combined public workshops and meetings that serve dual purposes – gathering input for both the Comprehensive Plan and the Housing Needs Assessment and Action Plan. These should be designed to solicit feedback on housing issues, as well as other aspects of long-term community planning like land use, environmental concerns, and infrastructure.
 - **Integrated Surveys and Feedback Tools:** Utilize common surveys and digital tools to gather insights relevant to both projects. This approach streamlines the data collection process, making it more convenient for residents to provide comprehensive feedback.





3. Data Sharing and Analysis:

- **Pool Data for Comprehensive Insights:** Share and analyze data collected from public engagement efforts to inform both the Comprehensive Plan and the Housing Needs Assessment and Action Plan. Look for overlapping themes, priorities, and concerns that can guide both housing strategies and broader planning decisions.
- **Cross-Referencing Findings:** Cross-reference findings from the Housing Needs Assessment with the broader goals and objectives of the Comprehensive Plan. This ensures that housing strategies in the Action Plan are in harmony with the Town's overall vision and planning.

4. Synchronized Reporting and Implementation:

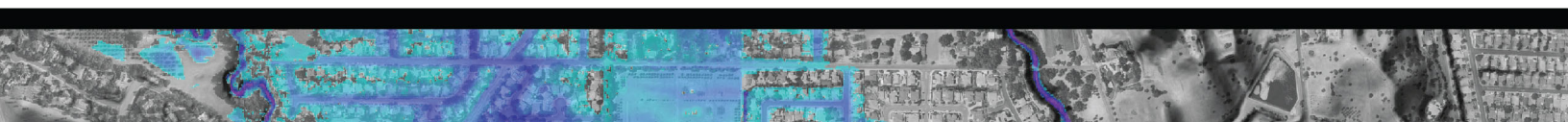
- **Joint Reporting:** Prepare joint reports that encompass the findings and recommendations from both the Comprehensive Plan and the Housing Needs Assessment and Action Plan. Present these findings to the Town Council and other stakeholders to demonstrate an integrated approach.
- **Coordinated Implementation Strategy:** Develop a coordinated implementation strategy that outlines how the insights from public outreach will be utilized in both the Strategic Housing Action Plan and the Comprehensive Plan. This should include timelines, responsibilities, and resource allocation.

5. Efficient Resource Utilization:

- **Maximize Resource Efficiency:** By consolidating tasks and aligning public outreach efforts, this ensures optimal use of limited resources, including funding, staffing, and project time. This approach not only saves costs but also enhances the effectiveness of the outreach and planning processes.

6. Ongoing Communication and Engagement:

- **Feedback Loop:** Establish a continuous communication channel to keep the community informed about progress and how their input is influencing both the Comprehensive Plan and the Housing Needs Assessment and Action Plan.



Cost Schedule Amendments

<div>Town of Frisco</div> <div>Housing Needs Assessment and Strategic Housing Action Plan</div> <div>Adjusted Cost Schedule</div>	<div><div><div>DPS</div></div><div>Dynamic Planning + Science</div></div>						Subconsultants					GRAND TOTAL		
	Ethan Mobley Principal	Brian Greer Data Viz.	Raini Ott Planner	Alex Krebs Data Viz. Assoc.	SUBTOTAL Hours	SUBTOTAL Cost	Triple Point	Western Spaces	Castlewood Community Capital	SUBTOTAL Hours	SUBTOTAL Cost	TOTAL Hours	TOTAL Cost	
	\$165/hr	\$155/hr	\$110/hr	\$100/hr			\$155/hr	\$165/hr	\$155/hr					
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 18	8 4	20 12	0	38 48	\$ 5,530 \$ 6,740	8 24	10 20	4 2	20 38	\$ 3,200 \$ 5,990	58 96	\$ 8,730 \$ 12,730	
Task 2. Housing Needs Assessment	20	40	8 072	10	142 150	\$ 18,420 \$ 19,300	10 20	80	4 2	92 104	\$ 15,060 \$ 16,920	234 254	\$ 33,480 \$ 36,220	
Task 3. Buildout Model & Scenario Planning	20	80	40	10	150	\$ 21,100	100	20	80	200	\$ 31,200	350	\$ 52,300	
Capacity Planning	10	4	10	10	34	\$ 4,370	0	6	0	6	\$ 990	40	\$ 5,360	
Sites Inventory	2	60	4	0	66	\$ 10,070	0	2	0	2	\$ 330	68	\$ 10,400	
Economic Impacts	2	0	2	0	4	\$ 550	100	2	0	102	\$ 15,830	106	\$ 16,380	
Financial Models	2	0	2	0	4	\$ 550	0	2	80	82	\$ 12,730	86	\$ 13,280	
Growth Scenarios	4	16	22	0	42	\$ 5,560	0	8	0	8	\$ 1,320	50	\$ 6,880	
Task 4. Strategic Housing Plan	33	26	8 074	10	149	\$ 18,615 \$ 19,275	40	160	10	210	\$ 30,870 \$ 34,150	333 359	\$ 49,485 \$ 53,425	
Stakeholder Coordination	4	4	20	10	38	\$ 4,480	8	48 35	0	56 43	\$ 7,015 \$ 9,160	94	\$ 13,640	
Strategy Identification and Refinement	4	4	8	0	16	\$ 2,160	0	30	0	30	\$ 4,950	46	\$ 7,110	
Draft Plan Development	13	4	12	0	29	\$ 4,085	16	22	8	46	\$ 7,350	75	\$ 11,435	
Community Outreach	6	6	12 6	0	18 24	\$ 2,580 \$ 3,240	8	30 16	0	22 38	\$ 3,570 \$ 6,190	40 62	\$ 6,150 \$ 9,430	
Public Open House	4	4	8 4	0	12 16	\$ 1,720 \$ 2,160	4	18 8	0	12 22	\$ 1,940 \$ 3,590	24 38	\$ 3,660 \$ 5,750	
Town Council Work Session	2	2	4 2	0	6 8	\$ 860 \$ 1,080	4 2	12 8	0	10 16	\$ 1,630 \$ 2,600	16 24	\$ 2,490 \$ 3,680	
Final Plan Production	6	8	28	0	42	\$ 5,310	8	30 26	2	28 40	\$ 4,520 \$ 6,500	78 82	\$ 11,150 \$ 11,810	
Final Plan Editing	4	4	24	0	32	\$ 3,920	4	10	2	16	\$ 2,580	48	\$ 6,500	
Final Presentation(s)	2	4	4	0	10	\$ 1,390	4	20 8	0	24 12	\$ 2,580 \$ 3,920	30 34	\$ 4,650 \$ 5,310	
ODC - Meeting Travel / Printing / ODC						\$ 2,025					\$ 2,000		\$ 4,025	
ODC - IMPLAN License						\$ 3,500					\$ -		\$ 3,500	
Project Totals	131 133	164 164	198 220	30 30	523 547	\$ 77,340 \$ 80,090	160 188	235 274	98 102	493 564	\$ 80,765 \$ 92,160	1016 1111	\$ 158,105 \$ 172,250	



EXAMPLE MODELS:

City of Napa Site Inventory Analysis with Potential Unit Capacities (Dynamic Planning + Science Build-Out Modeling):

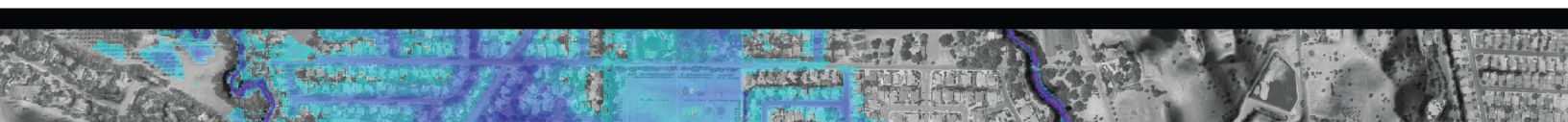
As mentioned as an example in our original RFP response, Dynamic Planning + Science recently collaborated with the City of Napa, CA on the [Sixth Cycle of the General Plan Housing Element Update](#) within California's heavily regulated housing environment. The site inventory and site capacity/build-out modeling is crucial for a community such as Napa or Frisco for several reasons:

- 1. Housing Needs Assessment:** Napa, like Frisco, faces challenges in meeting its housing needs. The site inventory helps in identifying and assessing potential sites for housing development. This is particularly important for addressing shortages in affordable housing and meeting diverse housing requirements and goals for different population segments.
- 2. Land Use Planning and Zoning:** The site inventory/build-out provides essential data for informed land use planning and zoning decisions. By identifying vacant and underutilized sites, planning staff can make strategic decisions about where to focus development efforts, which can lead to more efficient land use and better strategic planning outcomes.
- 3. Economic Development:** Identifying potential sites for development can spur economic growth. New housing developments can attract residents, which in turn can support local businesses, create jobs, and increase the city's tax base. (See Economic Modeling Example)
- 4. Sustainability and Environmental Impact:** The site inventory can aid in planning for sustainable development. By focusing on infill development in already urbanized areas, towns and cities can reduce sprawl, preserve open spaces, provide better connectivity for a community with diverse needs, and minimize environmental impacts.
- 5. Compliance with State Regulations:** Many states, including California, have specific requirements for communities to identify adequate sites to meet their assigned housing goals. The site inventory is a critical component in demonstrating compliance with these state mandates, particularly in the context of the Regional Housing Needs Allocation (RHNA) process which aims to analyze and address housing from a holistic, regional perspective. For Frisco, we will use many of the same methods to identify strategic actions that address local housing needs and may also provide benefits at the regional level.
- 6. Community Engagement and Transparency:** The process of creating and maintaining a site inventory can provide opportunities for community engagement. It allows residents to understand and participate in the development process, promoting transparency and public trust.

In summary, the site inventory is an essential tool used for Napa that we will develop for the Town of Frisco to effectively manage its growth, meet local housing needs, foster economic development, plan for sustainability, and engage with the community in its community planning efforts.

To develop a site inventory/build-out unit capacity based upon vacant and underutilized sites, the modeling approach used for the City of Napa and which will be adapted to address Frisco's needs can be summarized as follows:

- 1. Vacant Sites:** The unit capacity calculations for vacant sites in the site inventory are determined by the land use designations specified in the community's long-term plan, zoning code, building form



codes, or other mechanisms dictating density limits and requirements. For the City of Napa, this included the newly adopted General Plan, the Downtown Area Specific Plan, and the Zoning Ordinance, which were analyzed concurrently alongside other considerations, such as environmental constraints and exactions, to provide realistic residential densities for vacant parcels.

2. **Underutilized Sites:** Similar to the analysis for vacant sites, an inventory of potentially underutilized (non-vacant) sites is created based on long-term plans, land use codes, and the ratio of improvements to land value. Each parcel flagged as underutilized is then further evaluated using a programmatic model to determine its eligibility for inclusion and its residential unit capacity.
3. **Analysis Process:** Sites are analyzed for building footprints to confirm their vacancy status. The selection of underutilized sites is based on a buildout analysis developed according to the community's long-term land use plan. Development potential is assessed based on the likelihood of new development or redevelopment (e.g., known developer interest or recent development trends). Underutilized sites are defined as those with a low-to-moderate ratio of assessed improvements to land value. Each site is individually reviewed by local staff to confirm its vacancy, realistic development potential, and suitability for inclusion in the land inventory.
4. **Unit Capacity Calculation Methods:** The calculation of unit capacity uses one of three methods. For vacant parcels, the capacity is calculated based on the land use designation from the long-term community plan and/or specific area plan. For non-vacant parcels, the calculation is based on the buildout capacity defined by such plans. Various constraints, including environmental conditions, parcel size or shape, legal encumbrances, and previous uses, may disqualify a parcel from being included in the site inventory.

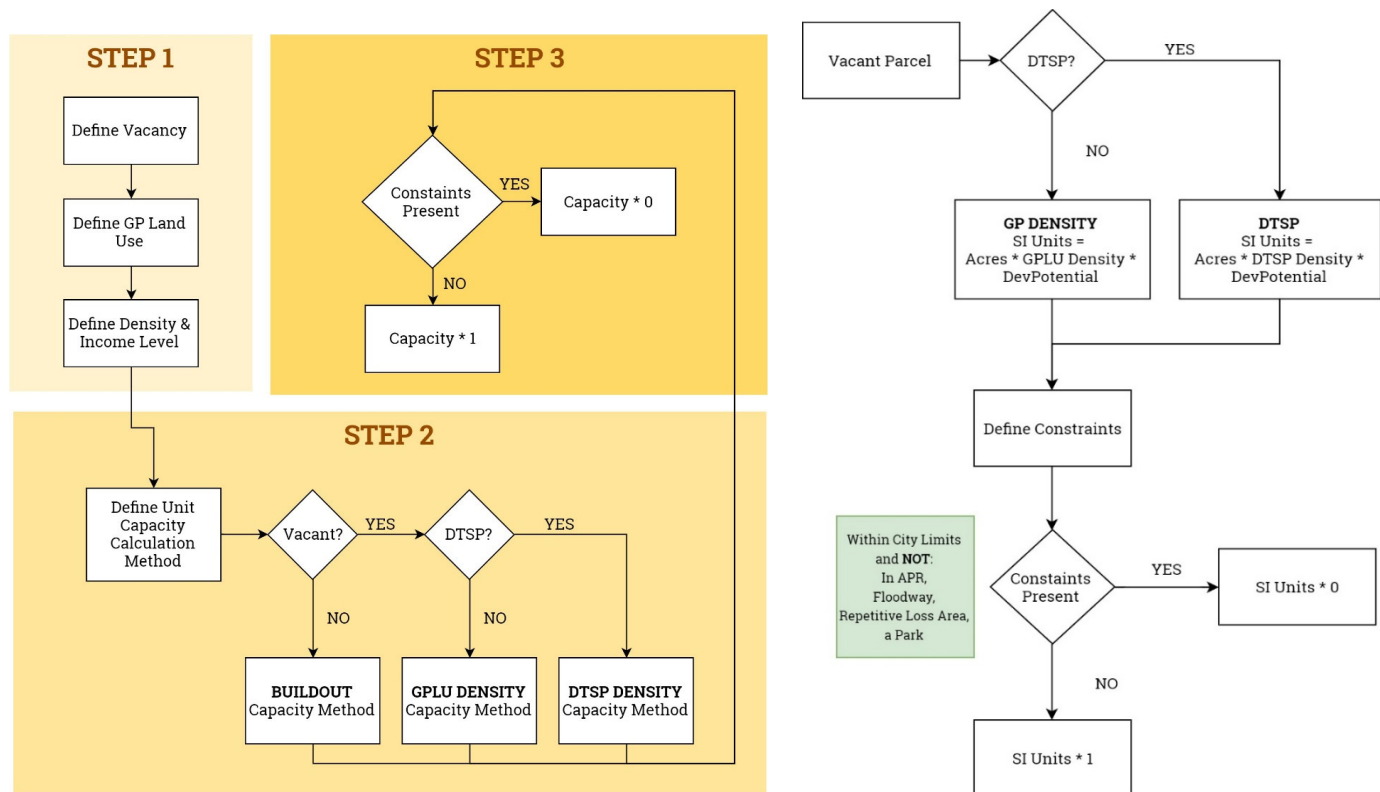


Figure 1: Example Diagrammatic Models for Capacity / Build Out Modeling



Economic Impact Models (Triple Point Consulting)

As mentioned as an example in our original RFP response, Dynamic Planning + Science has teamed up with Triple Point Consulting to provide economic modeling services. The owner of Triple Point, 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 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.

Colorado Buildout Models

Jeff was a primary developer of the East River Planning Model in Mt. Crested Butte Colorado, which was used to evaluate a significant annexation and proposed expansion of the town. Jeff updated this work in 2017 (North Gunnison County Buildout) and again in 2021 (North Village) on behalf of active developers in the region.

Jeff has developed several models of the financial and economic impacts of residential development on behalf of other developers in Colorado's mountain communities. However, the proprietary nature of the models precludes sharing.

Economic Models

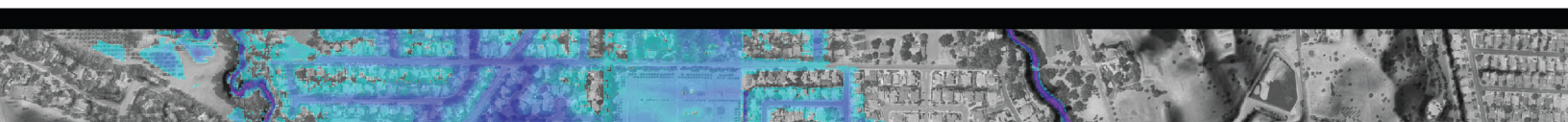
Elmore County, Idaho is using a Triple Point model of its "water economy" to evaluate the costs and benefits of various water supply projects and water allocation. This research is currently ongoing.

An economic model of the Lake Tahoe Basin's tourism economy was created by splicing together disparate data sets from 6 different jurisdictions around the lake. The model achieved consensus around how many visitors, visits and visitor days, the Basin experiences as part of a [broader planning process](#). The research also revealed the diverse nature of a significant number of "day visitors" from those just driving through (without needing parking nor spending) to those spending considerable sums (and requiring parking). Mendocino County, California's destination management organization is in the process of strategic planning. They have very little data available and an economic model of their tourist economy is supporting planning efforts currently underway.

Financial Models

Jeff created a proforma model of Keystone, Colorado's municipal budget over time and prior to incorporation on behalf of the Summit County Commissioners who wanted to understand the impact of proposed incorporation.

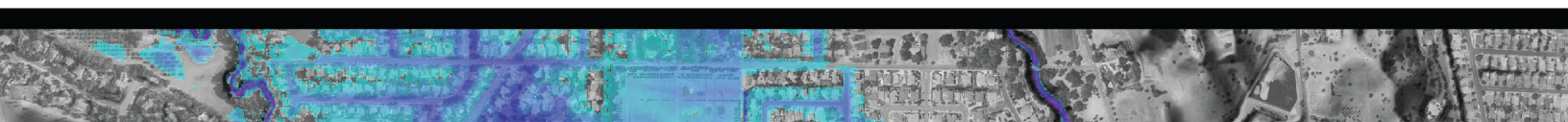
The Gunnison Library District relied on a financial model and pro forma forecasts of different operating scenarios to improve business development and seeking a successful mill levy increase. Variable tax revenue streams resulting from Tabor and Gallagher were important considerations. A pro forma budget from 2019 through 2023 predicted the operating costs of a to-be-built 15,000 square foot building, three new FTE, and a significantly altered operating budget. The pro forma was within \$60,000 of our actual 2023 budget, which exceeded \$2 million.





North Fork Ambulance simulated as many as 22 operating scenarios in order to unify its Board around direction and strategy. NFA decided to pursue creation of a special district funded by mil levy to avoid financial crisis. The model was also used to inform campaign messaging with passed with 83% support.

Please treat all model examples as confidential, not for distribution. Thank you!



Cost Schedule Amendments

Town of Frisco
Housing Needs Assessment and Strategic
Housing Action Plan

Adjusted Cost
Schedule



Dynamic Planning + Science

Subconsultants

GRAND TOTAL

Adjusted Cost Schedule	Ethan Mobley Principal		Brian Greer Data Viz.		Raini Ott Planner		Alex Krebs Data Viz. Assoc		SUBTOTAL Hours		SUBTOTAL Cost		Castlewood Community Capital			SUBTOTAL Hours		SUBTOTAL Cost		TOTAL Hours		TOTAL Cost	
	\$165/hr	\$165/hr	\$155/hr	\$155/hr	\$110/hr	\$110/hr	\$100/hr	\$100/hr					Triple Point \$155/hr	Western Spaces \$165/hr									
Project Management	40	10	0	0	0	0	0	0	50	\$ 8,150			4	4	4		12	\$ 1,900		62	\$ 10,050		
Task 1. Identify Goals and Objectives	2018	84	2012	0					3848	\$ 5,530, \$ 6,740			824	1020	42		2038	\$ 3,200, \$ 5,990		5866	\$ 8,730, \$ 10,720		
Task 2. Housing Needs Assessment	20	40	8072	10					142150	\$ 18,420, \$ 19,300			1020	80	42		92104	\$ 15,060, \$ 16,920		232154	\$ 32,210, \$ 36,220		
Task 3. Buildout Model & Scenario Planning	20	80	40	10					150	\$ 21,100			100	20	80		200	\$ 31,200		350	\$ 52,300		
Capacity Planning	10	4	10	10					34	\$ 4,370			0	6	0		6	\$ 990		40	\$ 5,360		
Sites Inventory	2	60	4	0					66	\$ 10,070			0	2	0		2	\$ 330		68	\$ 10,400		
Economic Impacts	2	0	2	0					4	\$ 550			100	2	0		102	\$ 15,830		106	\$ 16,380		
Financial Models	2	0	2	0					4	\$ 550			0	2	80		82	\$ 12,730		86	\$ 13,280		
Growth Scenarios	4	16	22	0					42	\$ 5,560			0	8	0		8	\$ 1,320		50	\$ 6,880		
Task 4. Strategic Housing Plan	33	26	8074	10					149	\$ 18,615, \$ 19,275			40	160	10		210	\$ 30,870, \$ 34,150		333359	\$ 49,485, \$ 53,425		
Stakeholder Coordination	4	4	20	10					38	\$ 4,480			8	4835	0		5643	\$ 7,015, \$ 9,160		94	\$ 13,640		
Strategy Identification and Refinement	4	4	8	0					16	\$ 2,160			0	30	0		30	\$ 4,950		46	\$ 7,110		
Draft Plan Development	13	4	12	0					29	\$ 4,085			16	22	8		46	\$ 7,350		75	\$ 11,435		
Community Outreach	6	6	426	0					1824	\$ 2,580, \$ 3,240			8	3016	0		2238	\$ 3,570, \$ 4,440		1152	\$ 1,150, \$ 4,440		
Public Open House	4	4	84	0					1216	\$ 1,720, \$ 2,160			4	188	0		1222	\$ 1,940, \$ 3,590		2438	\$ 2,580, \$ 5,790		
Town Council Work Session	2	2	42	0					68	\$ 850, \$ 1,080			42	128	0		1016	\$ 1,630, \$ 2,600		1624	\$ 2,430, \$ 4,690		
Final Plan Production	6	8	28	0					42	\$ 5,310			8	3026	2		2840	\$ 4,520, \$ 5,500		7850	\$ 11,450, \$ 14,100		
Final Plan Editing	4	4	24	0					32	\$ 3,920			4	10	2		16	\$ 2,580		48	\$ 6,500		
Final Presentation(s)	2	4	4	0					10	\$ 1,390			4	208	0		2412	\$ 2,580, \$ 3,920		3034	\$ 4,650, \$ 5,210		
ODC - Meeting Travel / Printing / ODC										\$ 2,025								\$ 2,000			\$ 4,025		
ODC - IMPLAN License										\$ 3,500								\$ -			\$ 3,500		