

Development-Related Impact Fee & Excise Taxes Project

<u>Phase I (Aug – Feb 2016)</u>			<u>Phase II (Feb – April)</u>			<u>Phase III (May – August)</u>			<u>Phase IV</u>	
Background			Policy Analysis			Recommendations and Decision making			Implementation	
	Intro Seminar Feb 1, 5:30 – 7:30 Council Chambers <i>Introductory seminar Required for working group; also open to the public *Video taped</i>	Working Group #1 Feb 2, 5:00 -8:00 Boulder Creek Room <i>Background Scope Research & Best practices Assumptions</i>	Working Group #2 March 2, 5:00 -8:00 Boulder Creek Room <i>Presentation of facility needs assessment Discussion of service levels, allocation methodologies</i>	Targeted public outreach	CC Study Session April 12 6:00 Council Chambers <i>Project update CC Feedback on Policy Options - service levels, allocations, funding strategies</i>	Working Group #3 May 9, 6:00 – 9:00 Boulder Creek Room <i>Draft reports & recommendations Comparative study Economic Analysis Scenarios</i>	Public Information Session - June 13	CC Study Session June 14 Council Chambers <i>Draft reports Comparative study Economic Analysis Scenarios Implementation timing</i>	CC Public Hearing - July 19 Council Chambers <i>Direction from Council</i>	CC SS Sept 13 Recommended Budget CC Meeting Oct 4 1 st reading of the budget CC Meeting Oct 18 2 nd reading of the budget
			WG 2.1 WG 2.2							
Impact Fees/ Excise Tax	<ul style="list-style-type: none"> Initiation Land use assumptions Capital facility needs 		<ul style="list-style-type: none"> Service levels Allocation scenarios Comparative study 			<ul style="list-style-type: none"> Draft report Final report (Fee levels) Economic analysis 			<u>2017</u> <u>Implementation</u>	
Transportation	<ul style="list-style-type: none"> Initiation Review literature/best practices/legal guidelines Determine demand factors Operating needs/ growth impacts 		<ul style="list-style-type: none"> Preliminary Recommendations –Policy Issues Capital facility needs& service levels Cost allocation methodologies Revenue credits Revenue Projections and funding strategy 			<ul style="list-style-type: none"> Fee levels Draft Report Final report 				
Housing	<ul style="list-style-type: none"> Project Initiation Analysis Parameters Peer Cities 		<ul style="list-style-type: none"> Nexus Analysis Jobs/Housing Affordability gap Max Fee level Development cost context Relationship to IZ/HET 			<ul style="list-style-type: none"> Draft Report Final Report 				
Public Art	<ul style="list-style-type: none"> City Program Analysis Research on other Programs 		<ul style="list-style-type: none"> Program framework recommendations Revenue Estimate 			<ul style="list-style-type: none"> Final Report 				

Development Fees Core Team

Susan Richstone Executive Sponsor
Lauren Holm Project Assistant
David Gehr Legal Expert
Peggy Bunzli Budget Office Expert
Trish Jimenez Department Finance Expert

Chris Meschuk

Project Manager

Impact Fees/Excise Tax

Devin Billingsley Project Team Lead

This update will include all of the components of the capital facility impact fee (Fire, Human Services, Library, Municipal Services, Parks & Recreation, and Police) and an update to the Park land component of the City's excise tax. This update will look at the current and projected development, and capital facility needs.

TischlerBise

Julie Herlands Project Manager, Impact Fee/Excise Tax Lead
Dwayne Guthrie Multimodal Transportation Funding Lead
Carson Bise Project Sponsor

Chris Hagelin Project Team Lead

The purpose of the study would be to develop a multimodal transportation impact fee and/or excise tax as well as other mechanisms to provide capital improvements and possibly initial and on-going operations and maintenance funding associated with new development. This study will go beyond impact fees and into operational funding tools including some level of consideration of both the needed capital facilities created by new growth as well as identifying revenue sources for programs, operations and maintenance.

Transportation

Affordable Housing

Kristin Hyser Project Team Lead

The city recently adopted an affordable housing linkage fee that was recommended by the 2009 impact fee and excise tax studies. This component will include preparation of a nexus study for an affordable housing linkage fee on new non-residential development that would mitigate the need for affordable and workforce housing created by the development.

Keyser Marston

David Doezema Project Manager, Housing Linkage Fee Lead
Reed Kawahara Housing Linkage Fee Technical Analysis
Kate Funk Public Art team Lead

Matt Chasansky Project Team Lead

The City Council recently accepted the Community Cultural Plan. One recommendation of the plan is to reinvest the public art program, including a sustainable and sufficient source of funding to implement. The purpose of this study would be to identify best practices across the country including both regulatory and fee based approaches, to compliment a standard source of funding, and recommend options for the city to develop a private arts requirement for new development.

Public Art

Technical Working Group

Development Related Impact Fee and Excise Tax Studies
Technical Working Group Contact Information

City Staff

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Devin Billingsley Impact Fee/Excise Tax Team Leader
Senior Budget Analyst, Finance Department

Kristin Hyser Housing Comm. Linkage Fee Team Leader
Community Investment Program Manager, Dept. of Planning, Housing, & Sustainability

Chris Hagelin Transportation Team Leader
Senior Transportation Planner, Department of Public Works – Transportation Division

Matt Chasansky Public Art Team Leader
Office of Arts & Culture Manager, Library and Arts Department

Working Group Members

Alan Rudy

Alan Rudy has experience in public policy development, and is engaged in numerous boards and organizations for the arts. He chaired a strategic planning committee that developed a plan for the Arts for the City of Houston.

Phone: 303-579-3316

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Andria Bilich

Dr. Andria Bilich has lived in Boulder for 15 years and is concluding her term on the Transportation Advisory Board. She also served on the Transportation Maintenance Fee working group.

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Ben Doyle

Ben Doyle is a Boulder resident and works in the Boulder County attorney's office and was on one of the Housing Boulder working groups.

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Benita A. Duran

Benita A. Duran is a longtime Boulder resident with a variety of local government experience, including neighborhood engagement, affordable housing and education.

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Clif Harald

Clif Harald is the Executive Director of the Boulder Economic Council. He has a background in economic consulting and fiscal impact analysis, and he works closely with the Boulder business community. He has a long interest in transportation issues.

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David Becher

David Becher is a lifelong Boulder resident with a strong interest in local government policy. He has worked for RRC Associates for more than 20 years, currently as director of research, and has a technical understanding of impact fees and excise taxes having done fee studies for communities.

Phone: 303-396-1611

Email: david@rrcassociates.com

Jeffrey Flynn

Jeffrey Flynn is a Boulder resident very interested in development and its impact, in particular the issue of development paying its fair share.

Phone: 404-218-6224

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John Koval

John Koval is a Boulder resident and principal in a local development company. He recognizes the importance of understanding the impacts of development on the city infrastructure and has served on numerous city and community boards and groups over the past 15 years.

Phone: 303-442-3351 x 1112

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Juana Gómez

Juana Gómez is a longtime Boulder resident and residential architect, and has been active in many Boulder Valley School District committees as a volunteer.

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Kenneth Hotard

Kenneth Hotard is the Senior Vice President of the Boulder Area Realtor Association and a longtime Boulder resident. He has been civically engaged in housing, business and transportation for the past 32 years.

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Lauren Schevets

Lauren Schevets is a project manager for Boulder Housing Partners, with a background in land use, real estate, financing and construction management.

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Mark Wallach

Mark Wallach recently moved to Boulder, with a background as a real estate lawyer with affordable housing experience. He is concerned with providing effective funding mechanisms to provide more affordable housing in Boulder and to provide adequate infrastructure.

Phone: 917-282-3552

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Steve Pomerance

Steve Pomerance is a former city council member, is very familiar with the city's past efforts to implement impact fees and excise taxes, and he is interested in ensuring full implementation of the city's policy that growth pay its own way.

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Development Related Impact Fee and Excise Tax Studies

Technical Working Group Purpose, Roles and Draft Operating Agreements

Purpose of the Technical Working Group

The purpose of the technical working group will be to review and discuss all four of the component areas, and to provide comments, feedback and input to the city staff and consultants on the project. City staff will utilize the technical working group's feedback when developing recommendations and materials for City Council consideration.

The group is not expected to come to consensus or otherwise come to an agreement or resolution, or to provide a recommendation. The role of the group is to provide a diverse range of opinions and perspectives to assist the city staff and consultants in the project.

Roles

To guide the development fees project, several teams have been created including the Core Team, and four different project teams supplemented by two consulting firms. The Core Team includes an executive sponsor, a project manager, four project team leaders, and various subject matter experts.

Technical Working Group

- Provide input to city staff and consultants on the development fees project.
- Discuss assumptions, options on service levels, and allocation methodologies prepared by the consultants and identify ideas/ issues to consider
- Review draft report material prepared by the consultants
- Provide feedback about how to communicate the issues and options to the public.

Project Manager

- Work with the working group, consultants and city staff to finalize meeting agendas
- Work with city staff to manage the project work plan and schedule
- Be available to working group members to ensure that questions are answered in a timely fashion & to address any process issues or concerns

City Staff & Consultants

- Prepare information for working group review & comment
- Keep city council informed & seek policy direction as needed through the process
- Make recommendations to city council
- Coordinate public input and outreach

Expectations

Working group members will be expected to:

- Attend four to six working group meetings.
- Review technical materials prior to working group meetings.
- Have experience, interest and/ or expertise related to development, development financing, and development related impacts from a diversity of perspectives such as neighborhood, business, development, government, affordable housing, public art, transportation or academics.
- Bring expertise and interests but participate as an individual, not as a representative from a particular group, sector or industry.
- Provide feedback to the project team on information prepared by city staff and the consultants to ensure it is understandable, accurate and complete.
- Identify areas and issues to consider, and provide feedback on how to communicate information.
- Engage in a shared and constructive dialogue with other members of the group, the consultants, and city staff.

Draft Operating Agreements and Discussion Guidelines

The guidelines below are meant to encourage productive discussions and deliberation.

Fairness

- One person speaks at a time; be recognized by the facilitator/presenter before speaking.
- Share “air time.” Be succinct.
- Everyone participate!

Listening

- Focus on each speaker rather than preparing your response
- Avoid side conversations or interruptions

Respect

- Judge ideas, not people; keep the discussion civil
- If you don't like something that happened in the meeting, bring it up or discuss it with the project manager later so that it can be resolved. Don't let things fester.

Commitment

- Prepare for each session
- Attend each meeting
- Begin and end on time
- Get up to speed if you didn't attend
- Ask questions if you don't understand—either in the meeting or afterward by calling or emailing the project manager.

Communication with Other Groups, Individuals and the Media

All meetings are open to the public and the press and all members are free to comment publicly on the progress of the working group and the issues being discussed. However, in making public comments, each group member agrees to speak only for him or herself (and make this clear to the reporter); to avoid characterizing the personal position or comments of other members; and to be thoughtful of the impact that specific public statements may have on the group and its ability to complete its work.

Development Related Impact Fee and Excise Tax Studies Online Resources

Upcoming Public Meetings

*Any upcoming meetings will be listed under this section along with a brief description

Background Information

- Requirements of New Development
- Development Related Fees and Taxes Update
- Working Group Solicitation

Development-related Studies and Resource Library

- 2009 TischlerBise Development Excise Tax Study
- 2009 TischlerBise Development Impact Fee Study
- Boulder Valley Comprehensive Plan Growth Policies
- Boulder Valley Comprehensive Plan Service Criteria and Standards
- Master Plans for City Departments
- Paying for Growth: Impact Fees under Senate Bill 15 from the Colorado Municipal League

Virtual Technical Working Group Binder

Group Information

- Timeline
- Operating Agreements & Roles

Background

- City Council Study Session Memo – 10/13/2015
- City Council Study Session Summary – 11/10/2015