

**AGENDA
CITY COUNCIL
REGULAR MEETING
CITY OF WYOMING, MINNESOTA
OCTOBER 21, 2025
7:00 PM**

CALL TO ORDER:

CALL OF ROLL:

DETERMINATION OF A QUORUM:

PLEDGE OF ALLEGIANCE:

OPEN FORUM:

"An opportunity for members of the public to address the City Council on items on/or not on the current agenda. Items requiring Council action maybe deferred to staff or Boards and Commissions for research and future Council Agendas if appropriate. You will be limited to three (3) minutes and we ask that you conduct yourself in a professional, courteous manner, and refrain from the use of profanity. Failure to abide by this policy may result in the loss of your privilege to speak".

APPROVAL OF MINUTES:

1. Consider approving the minutes of the "Regular Meeting" of the Wyoming, Minnesota City Council for October 7, 2025

SCHEDULED BID LETTINGS:

SCHEDULED PUBLIC HEARINGS:

2. To consider **Resolution 25-10-102** a resolution approving the Assessment Roll for the 2025 Improvement Project

CONSENT AGENDA:

Items under the "Consent Agenda" will be adopted with one motion; however, council members may request individual items to be pulled from the consent agenda for discussion and action if they choose.

3. Consider authorizing the payment of recommended bills, payroll and journal entries for the period of October 8, 2025 to October 21, 2025
4. To consider **Resolution 25-10-107** a resolution approving Chisago County as the City of Wyoming's designated Street Naming and Addressing entity
5. To consider **Resolution 25-10-103** a resolution authorizing payment to Ferguson Waterworks for Neptune 360 services in the amount of \$14,734.50

ACKNOWLEDGE RECEIPT OF REPORTS OF OFFICERS, BOARDS, COMMISSIONS AND DEPARTMENT HEADS:

6. Report of the Public Safety Director, Neil Bauer, for October 15, 2025
7. Report of City Building Official, Fred Weck, IV for October 16, 2025.
8. Report of the City Attorney, Tom Loonan, for October 16, 2025
9. Report of City Engineer Mark Erichson, WSB for October 15, 2025
10. Report of the Public Works Superintendent, Steve Reeves, for October 15, 2025

COMMUNICATIONS:

11. LMC - City of Excellence Award Article for the City of Wyoming
12. Emerald Ash Borer (EAB) Tree Grant
13. Results of Radiochemical Monitoring in the City of Wyoming

OLD BUSINESS:

NEW BUSINESS:

14. To consider **Resolution 25-10-105** a resolution approving a Conditional Use Permit Amendment C-25-006 Location: 6641 Lake Boulevard Applicant: Denyce McLaughlin of Top of the Valley Pet Resort Property ID Number: 21.11069.00
15. To consider **Resolution 25-10-106** a resolution approving an Interim Conditional Use Permit for a Cannabis Retailer: I-25-003 Location: 6641 Lake Boulevard Applicant: Billy Lavelle of 10,000 Bakes Property ID Number: 21.11069.00
16. To consider the selection of a consulting firm for the 2026-2030 Storm Water Utility Rate Study

COUNCIL REPORTS:

ADJOURN

**DRAFT MINUTES
CITY COUNCIL
REGULAR MEETING
CITY OF WYOMING, MINNESOTA
OCTOBER 7, 2025
7:00 PM**

CALL TO ORDER:

Mayor Lisa Iverson called the Regular Meeting of the Wyoming City Council for October 7, 2025, to order at 7:00 PM

CALL OF ROLL:

On a Call of the Roll, the following members of the Wyoming City Council were present: Councilmembers Lisa Iverson, Linda Nanko Yeager, Dennis Schilling, Brett Ohnstad, and Claire Luger

ABSENT: None

Also Present: Tom Loonan, Eckberg Lammers, Robb Linwood, City Administrator, Grant MacFarlane, Assistant City Administrator, Mark Erichson-WSB, Neil Bauer - Public Safety Director, Fred Weck, Zoning Administrator/Building Official, and Steve Reeves, Public Works Superintendent

DETERMINATION OF A QUORUM:

PLEDGE OF ALLEGIANCE:

OPEN FORUM:

APPROVAL OF MINUTES:

1. Consider approving the minutes of the “Regular Meeting” of the Wyoming, Minnesota City Council for September 16, 2025

A MOTION WAS MADE BY COUNCILMEMBER LUGER, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE THE MINUTES OF THE “REGULAR MEETING” OF THE WYOMING, MINNESOTA CITY COUNCIL FOR SEPTEMBER 16, 2025, AS SUBMITTED.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

2. Consider approving the minutes of the “Work Session Meeting” of the Wyoming, Minnesota City Council for September 16, 2025

A MOTION WAS MADE BY COUNCILMEMBER SCHILLING, SECONDED BY COUNCILMEMBER LUGER, TO APPROVE THE MINUTES OF THE “SPECIAL MEETING” OF THE WYOMING, MINNESOTA CITY COUNCIL FOR JUNE 30, 2025, AS SUBMITTED.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

SCHEDULED BID LETTINGS: NONE

SCHEDULED PUBLIC HEARINGS: NONE

CONSENT AGENDA:

Items under the "Consent Agenda" will be adopted with one motion; however, council members may request individual items to be pulled from the consent agenda for discussion and action if they choose.

3. To consider authorizing the payment of recommended bills, payroll, and journal entries for the period from September 17, 2025, to October 7, 2025
- ~~4. To consider accepting the resignation of Amanda Thill from the Wyoming Fire Department (pulled for separate discussion)~~
- ~~5. To consider authorizing the external hiring process for the position of Sergeant for the Wyoming Police Department (pulled for separate discussion)~~
6. To consider **Resolution 25-10-98**, a resolution approving a 15-month agreement between the City of Wyoming and Lexipol for the Wyoming Fire Department's Policy Manual
7. To consider **Resolution 25-10-97**, a resolution of support for the Minnesota Management and Budget Capital Project Application for the City of Wyoming Public Safety Building

Mayor Iverson – Asked to pull item #4 for separate discussion.

Council Member Nanko Yeager - Asked to pull item #5 for separate discussion.

A MOTION WAS MADE BY COUNCILMEMBER SCHILLING, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE #3, #6, and #7 OF THE WYOMING CITY COUNCIL CONSENT AGENDA

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

#4 - To consider accepting the resignation of Amanda Thill from the Wyoming Fire Department

Mayor Iverson – Expressed her appreciation for the service Amanda Thill had given to the Wyoming Fire Department.

#5 - To consider authorizing the external hiring process for the position of Sergeant for the Wyoming Police Department

Council Member Nanko Yeager – Asked if there was still 1 vacancy within the Wyoming Police Department.

Public Safety Director Bauer – Answered that there was a vacancy for a Police Officer.

Council Member Nanko Yeager – Asked if the City did an external hire, and if that person would fill the vacancy.

Public Safety Director Bauer – Explained that this would be filling Sergeant Rod's position for when he retires at the end of the year, and this would be pre-hiring for that position.

A MOTION WAS MADE BY MAYOR IVERSON, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE CONSENT AGENDA ITEM #4 - TO ACCEPT THE RESIGNATION OF AMANDA THILL FROM THE WYOMING FIRE DEPARTMENT, AND #5 - TO AUTHORIZE THE EXTERNAL HIRING PROCESS FOR THE POSITION OF SERGEANT FOR THE WYOMING POLICE DEPARTMENT

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson
Voting Nay: None
Abstain: None
Absent: None

ACKNOWLEDGE RECEIPT OF REPORTS OF OFFICERS, BOARDS, COMMISSIONS, AND DEPARTMENT HEADS:

8. Report of the Public Safety Director, Neil Bauer, for October 2, 2025

Council Member Ohnstad – Noted that one of the officers had made the decision to study for certification of the use of the Flock system in a public place, and wanted to commend that choice.

9. Report of City Building Official, Fred Weck, IV, for October 1, 2025

10. Report of City Attorney Tom Loonan, for October 2, 2025

11. Report of City Engineer Mark Erichson, WSB, for October 1, 2025

12. Report of Public Works Superintendent, Steve Reeves, for September 30, 2025

COMMUNICATIONS

13. Q3-2025 Automated License Plate Recognition (ALPR) Project Update

Public Safety Director Bauer – Gave a brief update to the Council on the ALPR system, its operations, officer training that has taken place, how it was being used, progress on data sharing agreements with surrounding agencies, and alerts that have been received through the ALPR system. He noted that there were links on the City's website that had a variety of information available for the public to view on how the City was using the information gathered from the system.

Council Member Nanko Yeager – Noted that the staff report had mentioned that the Department had expanded the use of the system to the 'hot list' and asked what other expansions they had in mind.

Public Safety Director Bauer – Explained that expanding to include the hot list was within their original plans and stated that they had no other expansions available.

OLD BUSINESS

NEW BUSINESS

14. To consider **Resolution 25-10-99**, a resolution declaring costs to be assessed and ordering preparation of the proposed assessment roll for the 2024 Street Improvement Project

15. To consider **Resolution 25-10-100**, a resolution calling a Public Hearing on assessments for the 2024 Street Improvement Project

City Engineer Erichson – Gave a brief overview of proposed assessments for the 2024 Street Improvement Project and the proposed Public Hearing date of November 4, 2025.

A MOTION WAS MADE BY COUNCILMEMBER LUGER, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE RESOLUTION 25-10-99, A RESOLUTION DECLARING COSTS TO BE ASSESSED AND ORDERING PREPARATION OF PROPOSED ASSESSMENT ROLL FOR THE 2024 STREET IMPROVEMENT PROJECT.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson
Voting Nay: None
Abstain: None
Absent: None

A MOTION WAS MADE BY COUNCILMEMBER SCHILLING, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE RESOLUTION 25-10-100, A RESOLUTION CALLING A PUBLIC HEARING ON ASSESSMENTS FOR THE 2024 STREET IMPROVEMENT PROJECT.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson
Voting Nay: None
Abstain: None
Absent: None

- 16. To consider Resolution 25-10-101, a resolution authorizing the preparation of a feasibility study for the 2026 Street Improvement Project**

City Engineer Erichson – Reviewed the past City Council discussions related to an updated 5-year CIP and explained that the recommendation from staff was for the Thurnbeck Ponds area for the 2026 Street Improvement Project.

Council Member Nanko Yeager – Asked when 259th Street would be included in the street improvement plans.

City Engineer Erichson – Stated that staff has identified 259th Street for inclusion in 2027.

A MOTION WAS MADE BY COUNCILMEMBER SCHILLING, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE RESOLUTION 25-10-101, A RESOLUTION AUTHORIZING THE PREPARATION OF A FEASIBILITY STUDY FOR THE 2026 STREET IMPROVEMENT PROJECT.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson
Voting Nay: None
Abstain: None
Absent: None

- 17. To consider appointments for the Zoning Board of Appeals**

Zoning Administrator/Building Official Weck – Reported that the City had received an application to appeal the issuance of a building permit for a new home, which required consideration by the Board of Appeals. He explained that Planning Commissioners Lobermeier and Holl had volunteered to serve on this Board, but they also need 2 Councilmembers, as well as 1 member of the public.

Mayor Iverson – Suggested that Councilmembers Ohnstad and Schilling serve on the Board of Appeals.

Councilmembers Schilling and Ohnstad agreed to serve on the Board of Appeals.

Mayor Iverson officially appointed Councilmember Ohnstad, Councilmember Schilling, Planning Commissioner Holl, Planning Commissioner Lobermeier, and Bruce Spangler to serve on the Board of Appeals.

- 18. To consider a Proclamation declaring October 1, 2025 – October 31, 2025 as ‘Manufacturer’s Month’ in the City of Wyoming**

Assistant City Administrator MacFarlane – Reviewed the proposed Proclamation to declare Manufacturer's Month in the City and outlined the number of manufacturing businesses and employees in the County. He noted that there would be an event held at Splitrocks on October 8, 2025, from 8:30 a.m. to 1:30 p.m. that will allow students to visit with local businesses for possible opportunities in career exploration within manufacturing.

A MOTION WAS MADE BY MAYOR IVERSON, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE A PROCLAMATION DECLARING OCTOBER 1, 2025 – OCTOBER 31, 2025, AS 'MANUFACTURER'S MONTH' IN THE CITY OF WYOMING

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

City Attorney Loonan – Explained that the Council would have to revisit item #17 because the appointments for the Board of Appeals needed to be approved by the majority of the Council.

#17 - To consider appointments for the Zoning Board of Appeals – continued....

A MOTION WAS MADE BY COUNCILMEMBER OHNSTAD, SECONDED BY COUNCILMEMBER LUGER, TO APPOINT COUNCILMEMBER OHNSTAD, COUNCILMEMBER SCHILLING, PLANNING COMMISSIONER HOLL, PLANNING COMMISSIONER LOBERMEIER, AND BRUCE SPANGLER TO SERVE ON THE BOARD OF APPEALS.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

19. To consider a Wyoming City Council Work Session on October 21, 2025

City Administrator Linwood – Explained the request by City staff to hold a City Council Work Session on October 21, 2025, to continue due diligence on the property located at 26263 Forest Boulevard.

Council Member Schilling – Stated that he would be in Cleveland on October 21, 2025, but would like to attend virtually. He explained that he would not know if his schedule would allow him to attend virtually until tomorrow.

Council Member Ohnstad – Explained that he would be in San Diego on October 21, 2025, and would not be able to attend virtually.

A MOTION WAS MADE BY MAYOR IVERSON, SECONDED BY COUNCILMEMBER LUGER, TO APPROVE A CITY COUNCIL WORK SESSION ON OCTOBER 21, 2025, AT 5:30 P.M.

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

Mayor Iverson - Suggested that the Council complete their reports before they move into the Closed Session.

COUNCIL REPORTS:

Council Member Ohnstad – Attended the Park Advisory Commission meeting.

Council Member Nanko Yeager – No report.

Council Member Luger – No report.

Council Member Schilling – No report.

Mayor Iverson – No report.

Public Safety Director Bauer – Gave an overview of the recent Coffee with the Cops event and noted that another would be held in January of 2026.

Mayor Iverson recessed the meeting at 7:30 p.m. and reconvened at 7:36 p.m.

- 20.** To consider entering a Closed Session under MN State Statute 13D.05 Subd. 3(a) for the annual performance evaluation of City Administrator Linwood

A MOTION WAS MADE BY COUNCILMEMBER LUGER, SECONDED BY COUNCILMEMBER SCHILLING, TO ENTER INTO CLOSED SESSION AT 7:37PM

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

A MOTION WAS MADE BY COUNCILMEMBER ONSTAD, SECONDED BY COUNCILMEMBER SCHILLING, TO ENTER INTO CLOSED SESSION AT 8:03

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

A MOTION WAS MADE BY MAYOR IVERSON, SECONDED BY COUNCILMEMBER OHNSTAD, TO APPROVE A CONTRACT BETWEEN CITY ADMINISTRATOR, ROBB LINWOOD AND THE CITY OF WYOMING

Voting Aye: Luger, Schilling, Ohnstad and Iverson

Voting Nay: Nanko Yeager

Abstain: None

Absent: None

A MOTION WAS MADE BY COUNCILMEMBER SCHILLING, SECONDED BY COUNCILMEMBER OHNSTAD, TO ADJOURN THE OCTOBER 7, 2025, “REGULAR MEETING” OF THE WYOMING, MINNESOTA CITY COUNCIL REGULAR MEETING AT 8:05PM

Voting Aye: Schilling, Nanko Yeager, Luger, Ohnstad, Iverson

Voting Nay: None

Abstain: None

Absent: None

A portion of this public meeting may be closed to discuss “Labor Negotiation Strategies”; “Misconduct allegations or charges”; “Attorney-client privilege”; or

NEXT REGULAR MEETING:
OCTOBER 21, 2025
7:00 PM

Request for Council Action

Date: October 21, 2025

To: Wyoming City Council, Mayor Lisa Iverson, Councilmembers Claire Luger, Linda Nanko Yeager, Brett Ohnstad, and Dennis Schilling

Cc: Robb Linwood; File

From: City Engineer, Mark Erichson, PE

RE: 2025 Street Improvement Project
Adopt Assessments

Staff has prepared a resolution adopting the assessments for the 2025 Street Improvement Project for your consideration in accordance with the requirements of state statutes Chapter 429 for assessments to benefitting properties. A copy of the assessment role is attached for your reference. As part of the assessment hearing, staff will give a PowerPoint presentation identifying the improvements, costs and detail payment options. A summary of project costs and assessment calculation is shown below:

Total Project Cost:	\$553,350
• Surface and Drainage Improvements	\$425,100
• Trail Improvements (Not Assessed)	\$128,250
Assessable Costs (Surface and Drainage):	\$425,100
Portion to be assessed (20%):	\$85,020
• Total Number of Units:	49.5 assessable units
• Assessment Rate per Unit:	\$1,635.00 (\$1,703.00 identified at Public Hearing 05/06/2025)

Recommendation:

Approve Resolution No. 10-25-102 a resolution adopting the assessments for the 2025 Street Improvement Project.

RESOLUTION 25-10-102

**CITY OF WYOMING
CHISAGO COUNTY, MINNESOTA**

**RESOLUTION ADOPTING ASSESSMENTS
FOR THE 2025 STREET IMPROVEMENT PROJECT**

WHEREAS, pursuant to proper notice duly given as required by law, the council has met and heard and passed upon all objections to the proposed assessment for 2025 Street improvement project generally located along 256th Street from Gramford Avenue to 670 feet east of Grizzly Court, Grail Court from 256th Street to cul-de-sac, Grand Prix Court from 256th Street to cul-de-sac, Grizzly Court from 256th Street to cul-de-sac, Greenwood Court from 256th Street to cul-de-sac.

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF WYOMING, MINNESOTA:

1. Such proposed assessment, a copy of which is attached hereto and made a part hereof, is hereby accepted and shall constitute the special assessment against the lands named therein, and each tract of land therein included is hereby found to be benefited by the proposed improvement in the amount of the assessment levied against it.
2. Such assessment shall be payable in equal annual installments extending over a period of 5 years, the first of the installments to be payable on or before the first Monday in January 2026, and shall bear interest at the rate of 5 percent per annum from the date of the adoption of this assessment resolution. To the first installment shall be added interest on the entire assessment from the date of this resolution until December 31, 2025. To each subsequent installment, when due, shall be added interest for one year on all unpaid installments after November 21, 2025
3. The owner of any property so assessed may, at any time prior to certification of the assessment to the county auditor, pay the whole of the assessment on such property, with interest accrued to the date of payment, to the city treasurer, except that no interest shall be charged if the entire assessment is paid within 30 days from the adoption of this resolution; and he/she may, at any time thereafter, pay to the city treasurer the entire amount of the assessment remaining unpaid, with interest accrued to December 31 of the year in which such payment is made. Such payment must be made before November 15 or interest will be charged through December 31 of the next succeeding year.¹
4. The clerk shall forthwith transmit a certified duplicate of this assessment to the county auditor to be extended on the property tax lists of the county. Such assessments shall be collected and paid over in the same manner as other municipal taxes.

This resolution was adopted by the City Council of the City of Wyoming on the 21st day of October, 2025.

ATTEST:

Lisa Iverson, Mayor

Robb Linwood, City Administrator/Clerk



Request for Council Action

Date: October 21, 2025

Presented to: Mayor Iverson and City Council Members

Department: Administration

Reference: Authorize City Claims

Method: Consent

Background Information:

Minnesota law provides that the city council has full authority over the city's financial affairs, including the disbursement of public funds. All written instruments must be executed by the mayor and clerk/administrator, pursuant to authority granted by the council.

City Staff has prepared a list of recommended bills, payroll, and journal entries (claims) for Council consideration. Claims may be inspected by the public at the Wyoming City Hall Building (26885 Forest Blvd.) upon request.

Recommended action: Authorize payment of recommended bills, payroll, and journal entries for the period of October 8, 2025 to October 21, 2025.



Request for Council Action

Date: October 15, 2025

Presented to: Mayor Iverson and City Council Members

Presented by: Grant MacFarlane, Assistant City Administrator

Department: Administration

Reference: Addressing Authority

Method: Consent

Background Information:

Chisago County has acted as the City of Wyoming's designated Street Naming and Addressing authority since 1997. As this authority, Chisago County is responsible for all addressing, readdressing, and street naming within the City of Wyoming. Chisago County performs this duty for nearly every city located within the County. The County was designated in this role to ensure that all addresses within their jurisdiction remain consistent and correct, which is vital in the role of dispatching services both public and private. This includes the dispatch of police, fire, ambulance, and other emergency services.

Chisago County is currently in the process of updating their Chisago County Street Naming and Addressing Policy which outlines these responsibilities. The County is requesting an updated resolution from the City which names Chisago County as the designated street naming and addressing authority as a part of this update.

Recommended action: Approve **Resolution 25-10-107** a resolution designating Chisago County as the City of Wyoming's Street Naming and Addressing Authority.

RESOLUTION NO. 25-10-107

A RESOLUTION AUTHORIZING CHISAGO COUNTY TO PROCEED AS THE CITY OF WYOMING'S DESIGNATED ADDRESSING AND RE-ADDRESSING COORDINATING AGENCY

WHEREAS, Chisago County is conducting an update to the Chisago County Street Naming and Addressing Policy; and,

WHEREAS, Chisago County has been the City of Wyoming's designated addressing and re-addressing entity since 1997; and,

WHEREAS, Chisago County's updated Street Naming and Addressing Policy requires that the City of Wyoming provide an updated resolution stating that this agreement remains the City's preference; and,

WHEREAS, This agreement reaffirms Chisago County as the authority to address the streets, buildings, and locations within the City in order to provide for the orderly dispatch of services both public and private; and,

WHEREAS, Chisago County will ensure that City of Wyoming addresses remain consistent and correct for the purpose of communicating with fire, police, ambulance, and other emergency services; and,

THEREFORE BE IT RESOLVED, the City of Wyoming authorizes Chisago County to act as the addressing and re-addressing coordinating agency within the City of Wyoming.

ADOPTED BY THE CITY COUNCIL OF THE CITY OF WYOMING ON THE 21ST DAY OF OCTOBER, 2025.

CITY OF WYOMING

By: _____
Lisa Iverson, Mayor

ATTEST:

Robb Linwood, City Administrator/Clerk



Request for Council Action

Date: October 15, 2025

Presented to: Mayor Iverson and City Council Members
Presented by: Steve Reeves, Public Works Superintendent
Department: Public Works
Reference: Ferguson Waterworks Invoice
Method: Consent

Background Information: The City of Wyoming works with Ferguson Waterworks for our meter reading & water usage system. As a part of this system, an annual fee is required to access data and communications for meter reading equipment. This fee was a budgeted expense.

Recommendation: To approve a **Resolution 25-10-103** approving payment to Ferguson Waterworks in the amount of \$14,734.50 for the meter system in 2025.

PUBLIC WORKS

Phone: 651-462-0580 • Fax: 651-462-0581

PO Box 188 • 26490 Faxton Avenue • Wyoming, MN 55092

RESOLUTION 25-10-103

A RESOLUTION AUTHORIZING PAYMENT TO FERGUSON WATERWORKS FOR 2025 NEPTUNE 360 SERVICES IN THE AMOUNT OF \$14,734.50

WHEREAS, the City of Wyoming utilizes Neptune 360 as its meter reading and water usage system; and,

WHEREAS, Neptune 360 is an important component of collecting accurate water reading and usage data; and,

WHEREAS, Ferguson Waterworks provides the City with access to Neptune 360's services; and,

WHEREAS, the fee for Neptune 360 services in 2025 was \$14,734.50; and

NOW, THEREFORE, BE IT RESOLVED by the City Council hereby authorizes payment to Ferguson Waterworks for 2025 Neptune 360 services in the amount of \$14,734.50.

**ADOPTED BY THE CITY COUNCIL OF THE CITY OF WYOMING THIS 21ST
DAY OF OCTOBER, 2025.**

CITY OF WYOMING

By: _____
Lisa Iverson, Mayor

ATTEST:

Robb Linwood, City Administrator/Clerk



October 15, 2025

Re: Public Safety Activity Report – October 22, 2025, City Council Meeting

Police Update

ALPR System

We are actively investigating a harassment/stalking case that the suspect was identified using the ALPR system – our first success using the system from an investigative perspective! It's exciting to see the capacity of the system and identify a suspect that absolutely would not have been identified without the system.

Fire Update

Outreach

At the end of October, the Wyoming Elementary School 2nd Graders will be taking their tour of the city and will visit the fire station.

Hiring

We have seen a steady stream of applicants for the fire department and Deputy Chief Hastings is following up with them to conduct interviews, etc. Increased marketing on social media has hopefully raised awareness.

Upcoming Community Outreach Events

January 2026 – Coffee with a Cop, McDonalds – Details TBD

Neil D. Bauer, Ed.D.
Public Safety Director/Police Chief



wyoming@wyomingmn.org • Phone: 651-462-0575 • Fax: 651-462-0576

PO Box 188 • 26885 Forest Boulevard • Wyoming, MN 55092



October 16, 2025
Honorable Mayor and City Council
City of Wyoming
26885 Forest Boulevard
Wyoming, MN 55092

RE: OCTOBER 21, 2025 CITY COUNCIL MEETING

Dear Mayor and Council Members:

This letter is intended to summarize on-going commercial building projects and zoning issues within the City. Some of these items may be separate agenda matters, while others are for informational purposes only.

Hair Salon

No update. Final work is being completed. All rough-in inspections have been done. Permits have been issued to remodel the former office space at 5350 East Viking Boulevard into a hair salon.

Sunrise Flour Mill

No update. Phase 1, the warehouse area, has been completed and is being utilized. The flour mill portion of the building is tentatively scheduled to resume at the beginning of 2026. The building permit has been issued to remodel the existing 24,000 square foot building located at 26327 Fallbrook Avenue into a flour mill for Sunrise Flour Mill. Sunrise Flour Mill is relocating from North Branch.

Fairview Hospital #1

No Update. The final inspections for Phase 1 have been approved. Phase 2 consists of minor work in the control room. Framing, plumbing, and HVAC rough-ins have been approved. The permit to remodel the CT scanner room has been issued.

Planning Commission

The Planning Commission held a public hearing to consider a Comprehensive Plan Land Use Map amendment and a rezoning of a parcel. This is a separate agenda item.

The Planning Commission held a public hearing to consider a conditional use permit for a commercial kennel. This is a separate agenda item.

The Planning Commission held a public hearing to consider an interim conditional use permit for a cannabis retailer. This is a separate agenda item.



DEPARTMENT OF BUILDING SAFETY

P.O. Box 188, 26885 Forest Blvd., Wyoming, MN 55092

Phone: 651-462-4947 Fax: 651-462-3938



**ECKBERG
LAMMERS**
ATTORNEYS AT LAW

www.eckbergammers.com

Email Writer's
Direct Dial:
(715) 808-8842

Writer's Email:
tloonan@eckbergammers.com

October 16, 2025

Robb Linwood
City of Wyoming
26885 Forest Boulevard
Wyoming, MN 55092

Delivered via Email

Re: *City of Wyoming*
Status Update for the Period of – October 3rd - 16th

Dear Robb:

Our office continues our role as general counsel, answering questions, addressing legal concerns, and reviewing items for the City as requested. We are assisting the city with land use disputes and advising related to on going real estate and zoning matters.

Please contact me directly if you have any questions regarding this correspondence. Thank you for allowing us to serve the City of Wyoming.

Very Truly Yours,

s/ Thomas R. Loonan

Thomas R. Loonan
City Attorney

Stillwater Office
1809 Northwestern Avenue
Stillwater, MN 55082
Phone: 651-439-2878
Fax: 651-439-2923

Hudson Office
430 Second Street
Hudson, WI 54016
Phone: 715-386-3733
Fax: 715-386-6456



Engineer's Report

.....
October 15, 2025

Honorable Mayor and City Council
City of Wyoming, MN
26885 Forest Boulevard
Wyoming, MN 55092

Re: October 21, 2025, City Council Meeting
 WSB Project No. 027762-000

Dear Mayor and Council Members:

This engineer's report is intended to update you on engineering activities within the city since the last council meeting. Some of the items below may be on the agenda with more detailed information provided, while the other items below are for informational purposes only.

2025 Street Improvement Project

The project is substantially complete. A meeting was held on October 1 to review final punch list items with the contractor. The contractor has completed the majority of these punch list items. Notices for the assessment hearing have been placed in the newspaper and individual notices have been sent to the property owners. The assessment hearing will be held October 21st.

2024 Street Improvement Project

The project is substantially complete. The contractor will need to complete punch list items prior to contract closeout. The contractor's subcontractor has been unreliable and spraying of weeds and slit seeding has delayed finishing work multiple times. The assessment hearing has been scheduled for November 4th. Notices to the paper and properties are being sent to provide notice per state statute.

2026 Street Improvement Project

After receiving authorization to proceed with the feasibility study, staff will send a letter notifying residents of the project, meet with public works to discuss scope, complete survey and pavement coring in advance of setting up our first neighborhood informational meeting.

Katies Glen

Staff have reviewed the work completed to date and authorized the reduction in the letter of credit to 125% of the remaining value of work to be completed. The final lift of pavement has been completed. Once punch list items are all complete, we will ask the City Council to accept the improvements and release escrows and the letter of credit.

Diamond Ridge Development

Remaining punch list work has been completed, and we are waiting for the as-builts to be submitted. We expect final acceptance of the improvements will take place this fall. Jesse Moxness will be submitting building permits for these three lots soon.

Sunrise Riverbank Development (residential and commercial)

The residential portion of the development is on hold. The property owners we have been working with have submitted different ideas on how to serve the property and how they would access the commercial portion of the site. The County has also developed another East Viking Boulevard and Kettle River Boulevard concept based on these new considerations. This concept has been submitted to MNDOT to get their feedback.

Summer Fields Development

Plan review for the next addition is underway along with a city designed lift Station and generator. The amendment of the PUD was recently approved. We have received updated plans for the project, and we have provided our comments. There is likely one additional phase of the development following the 4th Addition. The developer has expressed interest in grading this fall/winter with utility construction slated to start in the spring.

Thank you for the opportunity to update the Council on current matters in the city.

Sincerely,

WSB and Associates, Inc.

Mark Erichson, P.E., City Engineer



October 15, 2025

Honorable Mayor Iverson and City Council Members Nanko Yeager, Luger, Ohnstad, and Schilling.

RE: October 21, 2025 City Council Meeting

Public Works Department Activity

- Fall hydrant flushing was completed Friday October 3rd. All operators were a part of the operation.
- 3 operators attended training in advance of their wastewater collections exam. Successful completion of the exam is necessary to earn this certification which is a requirement of the maintenance worker position.
- Staff attended the 2025 MN Fall Expo hosted at St Cloud Public Works & sponsored by the Minnesota Department of Transportation, Minnesota LTAP, Minnesota Street Superintendents Association, and American Public Works Association - Minnesota Chapter. The event primarily addresses fall and winter transportation maintenance topics.
- Maintenance activities continue on Kettle River Blvd due to events at Pinehaven/Great Pumpkin Walk/Dead End Hayride
- Continuing to locate city infrastructure, water, sanitary sewer, and storm sewer as a large fiber project is being conducted by ROC on behalf of Frontier Communications. This is a significant project that requires us to locate our utilities to mitigate risks to our underground facilities. The Public Works Maintenance Staff have done an excellent job under short timelines to get our utilities marked
- Street sweeping in the enhanced areas is ongoing
- Sign maintenance is underway, daylighting signage that was previously blocked by tree limbs or branches, installing new cross walk signs at newly installed cross walks, and replacing signposts/blade holders that had met their useful life
- Responded to resident contacts
- Department attended Safety Training in Hugo with Lino Lake, White Bear Township & Hugo Public Works Departments. Topics covered: PPE, Hearing Conservation, Silica Exposure, & Confined Space
- Routine safety checks were conducted throughout the department including eye washing stations, fire extinguishers and climbing equipment

PUBLIC WORKS

Phone: 651-462-0580 • Fax: 651-462-0581

PO Box 188 • 26490 Faxton Avenue • Wyoming, MN 55092

Streets:

- Grading of gravel roads is underway. Cleaned shop and performed annual maintenance to the brine making equipment used for winter operations. Partnered with the concrete contractor for the 2025 Street Improvement Project to preform pedestrian ramp installations on 257th. Our maintenance crew performed the restoration of turf to the pedestrian ramp sites.

Utilities:

The crew completed utility locates in the city. Meter installs as they come through. While fall is technically here, we have yet to see a slowdown for locate requests., meter drop offs and inspections.

- **Sanitary Sewer**

Staff continue to check lift stations & generators during daily rounds. Lift station equipment inspections and maintenance is ongoing. Replaced out-of-date batteries at lift station generators as we head into the cold season and need the generators to start when necessary.

- **Water:**

Continued water testing and monitoring the city's water distribution system. South Water Tower pumped to waste. Hydrant painting for 2025 is complete. Fluoride report was completed and submitted.

Surface/Storm Water:

Fall Street Sweeping is underway. Working with Comfort Lake Forest Lake Watershed District on an Enhanced Street Sweeping program for 2026. Restoration of storm sewer outfall adjacent to Hawk Meadows Park is complete.

Parks:

Fireside Park is open for use. Trash pick-up as needed. Installed accessible tables at Lion's & Goodview parks. Playground inspections and maintenance is ongoing. Replaced concrete panel at Swenson Park warming house.

Fleet:

Regular maintenance of vehicles is ongoing. Disposed of 2008 Mack dump truck with snow and ice control equipment for \$37,500. Our 2014 Ford F-350 utility truck equipped with a crane did not meet reserve again and has been brought back to town pending further assessment. All vehicles & equipment are receiving regularly scheduled maintenance at manufacturers' recommended intervals. Snowplow equipment has had annual maintenance and commercial vehicle inspection completed.

Respectfully submitted,
Steve Reeves
Public Works Superintendent

Growing Together: Wyoming's Community Garden Expands Access and Connection



BY DEBORAH LYNN BLUMBERG

For 16 years, residents of the City of Wyoming formed friendships, built healthy eating habits, and cut their grocery costs growing their own fruits and vegetables in a community garden on the grounds of M Health Fairview Lakes Medical Center.

The garden's 14 plots — managed by M Health Fairview — drew patients and staff from the medical center, residents of the adjacent Meadows on Fairview assisted living center, and others in the community seeking an affordable and accessible space to grow their own food. But the centrally located garden — the only community garden in Wyoming, and one of only four in all of Chisago County — had its share of challenges.

For years, the medical center had a long waitlist of people who were eager to grow their own squash, tomatoes, and sunflowers but lacked access to land.

"We simply did not have garden beds to offer," said Emily Carpenter, community partnerships manager with M Health Fairview Community Advancement. At one point, she turned away more than a dozen interested gardeners. In addition, the plots weren't accessible for people who use a wheelchair or have mobility issues that make bending and crouching difficult.

Costs for new beds, tools, and other equipment needed for new gardeners, who pay a \$25 annual fee, quickly added up. With limited resources, the medical center couldn't tackle an expansion and renovation alone. So, Carpenter and her team turned to the city for support.

Ultimately, the City of Wyoming secured state funding and collaborated with M Health Fairview Lakes Medical Center to expand and improve the garden's accessibility. The project earned the city a 2025 League of Minnesota Cities City of Excellence Award.

PHOTO COURTESY OF M HEALTH FAIRVIEW



The City of Wyoming partnered with M Health Fairview Lakes Medical Center and secured funding to expand the community garden, creating an accessible space that brings residents of all ages and backgrounds together.

A private-public partnership takes root

Conversations about community garden expansion between M Health Fairview and Wyoming City Administrator Robb Linwood began in 2023.

"It's something that we at the medical center have talked about for a long time," Carpenter said. "Our health system's mission is to heal, discover, and educate for longer, healthier lives, and the community garden really lives that mission out. We understand the vital role that access to nutritious food plays in people's overall health. And the community garden supports social connection, too." The garden helps to reduce barriers and advance access to healthy and nutritious food, she added.

The project aligned well with an overarching goal of the Council's, to help residents age happily and healthfully. With the nearest other community gardens located 15 to 20 minutes away in North Branch and Lindstrom, expanding the local garden was a logical step.

The expansion would also better serve residents of the nearby Heims Lake Villas, a growing 55-plus community.

Linwood proposed applying for an Age-Friendly Minnesota Community Grant from the Minnesota Department of Human Services. The City Council approved the plan, and the city secured more than \$19,000. An additional \$2,999 came from Chisago County Statewide Health Improvement Partnership (SHIP), a community-led initiative focused on building healthier communities in the state.

In addition to covering construction costs, funding also went toward purchasing new materials and shared tools for gardeners after Carpenter surveyed current gardeners about their garden wish-list. She purchased a second rototiller to break up and turn over soil, a new lawn mower after the previous one fizzled out, digital water timers, shovels, rakes, and gloves. Other costs the grant money will cover include ongoing garden maintenance and periodic classes for gardeners.

PHOTO COURTESY OF M HEALTH FAIRVIEW

on topics such as soil health, plant care, and harvesting techniques.

Building for access and engagement

Construction began in spring 2024, with support from city planning commission staff, their families, and other community members.

Wyoming Zoning Administrator/ Building Official Fred Weck designed the layout and helped lead the build. Over nine hours, volunteers graded and leveled the site, installed two brand new raised beds and four ground-level beds, filled them with soil, and enclosed the area with 60 feet of fencing. The garden now includes 20 beds and serves 32 gardeners, up from 14.

One of the newly added plots is used by Rise, which provides enrichment programs for adults with developmental disabilities. This is the program's first year growing its own produce, said Jamie Farley, activity coordinator at Rise.

"We planted things we plan to use in our cooking groups in-center — zucchini, squash, cucumber, broccoli, cauliflower, tomatoes, and various herbs," she said. "It has definitely been a learning experience so far, and we are already planning what we might do differently next year."

Farley added that the garden gives Rise greater flexibility and efficiency than their previous produce arrangement. "Previously we had collected produce from a local CSA [Community Supported Agriculture] program, but many of the things we got posed some challenges for cooking and weren't well liked. Unfortunately, much of it went to waste," she said. "The community garden space allows us to customize exactly what we get and how much we can harvest."

A garden that grows community

Today, residents age 18 and older gather at the garden to plant, water, and harvest produce and flowers. "Weekends are always buzzing at the garden," Carpenter said. "That's become a natural time for connection. It's been really amazing to see the community that's been built."

The garden includes shared apple and pear trees, and raspberry bushes. Gardeners collaborate on weeding, harvesting, and even donating extra produce to Family Pathways, a North Branch-based nonprofit that distributes food to local families in need.

"The garden is not just about tending to your food," Linwood said. "There's so much more. It draws residents of all ages and backgrounds. It really is about a shared space and about building social connection."

Carpenter notes that gardeners are especially grateful for a way to grow their own food as grocery prices rise. "They've told me, 'If I can save a little by growing my own food, I'm going to do that.'"

She credits the city's support from planning through promotion: "I can't begin to describe just how appreciative we are. They've been incredible partners from start to finish."

Wyoming Assistant City Administrator Grant MacFarlane calls the renovated community garden "a great added amenity" for city residents. "Anytime you can introduce a new amenity to the community, it's a huge draw for people," he said. "The expanded garden is being utilized a ton; it's been really great."

Next steps, and lessons for other cities

Given the project's success, there's already talk of future expansion, especially to add more raised beds. "If M Health Fairview Lakes Medical Center can



The garden expansion project aligned with the City Council's goal of helping residents age happily and healthfully.

find the space," MacFarlane said, "then we're certainly willing to go through the process again."

He believes that, while Wyoming's community garden project and partnership is unique, it's one that other cities and communities can learn from. To access funding, cities should lean on community-led initiatives like SHIP, he said.

"These organizations offering grants want you to succeed," said MacFarlane. "Don't be afraid to at least try." Also, tap into city staff members' skills and expertise, he added.

Linwood added that the project is a model for how local governments can collaborate with nonprofits and health care providers. "Don't be afraid to reach out," he said. "Sometimes we get siloed in our work, but when we lean on each other's strengths, we can make a real impact in our community." 

Deborah Lynn Blumberg is a freelance writer.



PHOTO COURTESY OF M HEALTH FAIRVIEW

ON THE WEB

Access a video of this Wyoming initiative at lmc.org/Wyoming.



Request for Council Action

Date: October 14, 2025

Presented to: Mayor Iverson and City Council Members

Presented by: Grant MacFarlane, Assistant City Administrator

Department: Administration

Reference: 2025 Community Tree Planting Grant

Method: Communication

Background Information:

The Minnesota Legislature allocated more than \$4 million for Community Tree Planting Grants to support tree planting in communities starting in 2025. This grant is open to all cities, counties, and townships with priority being given to projects that aim to remove and replace ash trees. Eligible activities of this grant include removal and replanting of shade trees, replacement of trees lost to forest pests and diseases, and establishing a more diverse community forest that is better able to withstand potential future diseases and forest pests.

City staff is seeking the City Council's authorization to apply for the Community Tree Planting Grant to engage in additional tree replacements throughout the City. The deadline to apply for this grant is October 28, 2025.

Recommendation: To authorize City staff to apply for the Minnesota Department of Natural Resources 2025 Community Tree Planting Grant.

September 30, 2025

Wyoming City Council
c/o Robb Linwood, Administrator
26885 Forest Boulevard, Box 188
Wyoming, Minnesota 55092-0188

Dear Council Members:

SUBJECT: Results for Radiochemical Monitoring, Wyoming, Chisago County, PWSID 1130018

Enclosed are the results of the most recent radiochemical samples collected from your public water system in accordance with Minnesota Rules, Chapter 4720 and the Safe Drinking Water Act. Past results indicated a maximum contaminant level (MCL) exceedance, as noted in the Notice of Violation letter previously sent.

The following entry point(s) are used on a limited basis as per the terms of the Compliance Agreement (CA) between your water system and the Minnesota Department of Health (MDH). Consumers will be notified of the radionuclide concentrations and the use of flow-weighted averaging for compliance, annually, in your Consumer Confidence Report (CCR). It is understood that if the allowed number of gallons pumped from the flow-weighted well(s) is exceeded, if required information is not reported on the CCR, or if the CA is not updated annually, a Notice of Violation will be issued. The following is a summary of the most recent results:

Sampling Site: Well #3 Entry Point

Contaminant: **Combined Radium (-226 & -228)**

MCL: >5 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
06/12/2025	5.40	pCi/L	25F0883-01	5.2
07/24/2024	4.90	pCi/L	24G2807-01	5.6

Contaminant: **Gross Alpha in Water**

MCL: >15 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
06/12/2025	16.00	pCi/L	25F0883-01	12.1
07/24/2024	8.10	pCi/L	24G2807-01	5.9

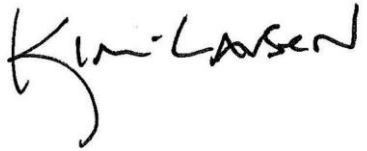
Due to the use of flow-weighted averaging as outlined in the signed CA, your water system is currently in a 'compliance' status. Monitoring on this entry point will be performed semi-annually to

ensure radiochemical levels remain within acceptable levels as outlined in your CA. Other entry points involved in flow-weighted averaging calculations, as mentioned in the CA, will be monitored annually. The CA will be updated annually to reflect changes within the water system.

All required radiochemical samples will be collected by your public water system and submitted to the MDH laboratory for analysis. Sample bottle(s) will be mailed to you with a labform and date that you are scheduled to collect your next sample(s). The results will be reported to you as soon as they become available. We will notify you if any action by your system is required.

This report should be placed in your records and a copy maintained on or near the water system premises and available for public inspection for not less than ten (10) years. If you have any questions, please contact Allison Dodge at (651) 201-5278 or email allison.dodge@state.mn.us.

Sincerely,

A handwritten signature in black ink that reads "Kim Larsen". The signature is written in a cursive, slightly slanted style.

Kim Larsen, P.E., Supervisor
Community Public Water Supply Unit
Environmental Health Division
4140 Thielman Lane, Suite 101
St. Cloud, Minnesota 56301

KAL:AD

Enclosure

cc: Water Superintendent
Allison Dodge, Compliance Officer
Collin Fetters, MDH St. Cloud District Office



Final Report

Minnesota Department of Health
Public Health Laboratory
Environmental Laboratory Section
601 Robert St. N., P.O. Box 64899
St. Paul, MN 55164-0899
651-201-5300

PWSID: 1130018
System Name: Wyoming
City: Wyoming

Program Code: HC

Type: I

Date Received: 06/12/25 09:21
Rep. Temp. (°C): 12.6

Collector Name: Dave Torma
Collector ID: None

MDH Sample Number: 25F0883-01

Location ID: E04
Sampling Point: Well #3 Entry Point

Collect Date: 06/12/25
Collect Time: 07:50
Matrix: Drinking Water

Field Residual Chlorine Result: .51
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Metal Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Uranium	<0.67	0.67		pCi/L	B5H1522	08/19/25 14:24	08/19/25 15:15	MDH-A	EPA 200.8	

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Gross Alpha	16	3.0	4.8593	pCi/L	B5G1372	07/16/25 13:16	07/26/25 00:00	JJF	EPA 900.0	MC
Radium-226	2.1	1.0	0.3359	pCi/L	B5H1226	08/11/25 11:26	08/22/25 00:00	MAK	EPA 903.0 Rev 1/ 904.0	
Radium-228	3.3	1.0	0.9707	pCi/L	B5H1226	08/11/25 11:26	08/19/25 12:47	MAK	EPA 903.0 Rev 1/ 904.0	

FINAL REPORT

Report ID: 09092025 72910

Generated: 9/9/2025 7:29:02AM

Authorized by:

*The results in this report apply only to the samples analyzed.
This report must not be reproduced, except in full, without the written approval of the laboratory.*

Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

Results were produced by Minnesota Department of Health, except where noted.

Batch B5H1522 - EPA 200 Series Prep

Blank (B5H1522-BLK1)

Prepared: 08/19/25 14:24 Analyzed: 08/19/25 15:14

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Uranium	<	0.67	pCi/L							MDH-A	

LCS (B5H1522-BS1)

Prepared: 08/19/25 14:24 Analyzed: 08/19/25 15:14

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Uranium	3.38		pCi/L	3.35		101	85-115			MDH-A	

Duplicate (B5H1522-DUP1)

Source: 25F0883-01

Prepared: 08/19/25 14:24 Analyzed: 08/19/25 15:16

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Uranium	<	0.67	pCi/L		<				20	MDH-A	

Duplicate (B5H1522-DUP2)

Source: 25G1390-01

Prepared: 08/19/25 14:24 Analyzed: 08/19/25 15:30

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Uranium	0.29	0.67	pCi/L		<			4	20	MDH-A	

Matrix Spike (B5H1522-MS1)

Source: 25F0883-01

Prepared: 08/19/25 14:24 Analyzed: 08/19/25 15:17

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Uranium	3.40		pCi/L	3.35		101	70-130			MDH-A	

Matrix Spike (B5H1522-MS2)

Source: 25G1390-01

Prepared: 08/19/25 14:24 Analyzed: 08/19/25 15:31

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Uranium	3.66		pCi/L	3.35		101	70-130			MDH-A	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

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Batch B5G1372 - Radiochemistry Alpha/Beta Prep

Blank (B5G1372-BLK1)

Prepared: 07/16/25 13:16 Analyzed: 07/26/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	<	3.0	pCi/L							JJF	

LCS (B5G1372-BS1)

Prepared: 07/16/25 13:16 Analyzed: 07/26/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	12.7	3.0	pCi/L	11.60		110	70-130			JJF	

Duplicate (B5G1372-DUP1)

Source: 25F0495-02

Prepared: 07/16/25 13:16 Analyzed: 07/26/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	7.2	3.0	pCi/L		6.3			13	20	JJF	

Matrix Spike (B5G1372-MS1)

Source: 25F0495-01

Prepared: 07/16/25 13:16 Analyzed: 07/26/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	24.2	3.0	pCi/L	11.60	7.9	141	70-130			JJF	M1

Batch B5H1226 - Radiochemistry Ra-226 Ra-228 Prep

Blank (B5H1226-BLK1)

Prepared: 08/11/25 11:26 Analyzed: 08/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	<	1.0	pCi/L							MAK	
Radium-228	<	1.0	pCi/L							MAK	

Blank (B5H1226-BLK2)

Prepared: 08/11/25 11:26 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	<	1.0	pCi/L							MAK	
Radium-228	<	1.0	pCi/L							MAK	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

PWSID: 1130018

Results were produced by Minnesota Department of Health, except where noted.

Batch B5H1226 - Radiochemistry Ra-226 Ra-228 Prep

LCS (B5H1226-BS1)

Prepared: 08/11/25 11:26 Analyzed: 08/19/25 12:47

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-228	5.0	1.0	pCi/L	4.51		112	80-120			MAK	

LCS (B5H1226-BS2)

Prepared: 08/11/25 11:26 Analyzed: 08/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	4.1	1.0	pCi/L	4.51		92	90-110			MAK	

Duplicate (B5H1226-DUP1)

Source: 25F0391-01

Prepared: 08/11/25 11:26 Analyzed: 08/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	0.3	1.0	pCi/L		<			34	20	MAK	QT
Radium-228	0.4	1.0	pCi/L		<			80	20	MAK	QT

Matrix Spike (B5H1226-MS1)

Source: 25F0271-01

Prepared: 08/11/25 11:26 Analyzed: 08/19/25 12:47

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-228	9.9	1.0	pCi/L	9.03	1.1	97	70-130			MAK	

Matrix Spike (B5H1226-MS2)

Source: 25F0128-01

Prepared: 08/11/25 11:26 Analyzed: 08/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	9.0	1.0	pCi/L	9.02	<	94	80-120			MAK	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

PWSID: 1130018

Data Qualifiers and Definitions

M1	Matrix spike and/or matrix spike duplicate recovery was high; the associated laboratory control sample and/or laboratory control sample duplicate recovery was acceptable.
MC	Result is greater than the MCL.
QT	RPD between sample duplicates not within acceptance limits. Analyte concentration within range for NAD comparison and NAD within acceptance limits.

Work Order Comments

Samples were received in proper condition.

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

October 16, 2025

Wyoming City Council
c/o Robb Linwood, Administrator
26885 Forest Boulevard, Box 188
Wyoming, Minnesota 55092-0188

Dear Council Members:

SUBJECT: Results for Radiochemical Monitoring, Wyoming, Chisago County, PWSID 1130018

Enclosed are the results of the most recent radiochemical samples collected from your public water system in accordance with Minnesota Rules, Chapter 4720 and the Safe Drinking Water Act. Past results indicated a maximum contaminant level (MCL) exceedance, as noted in the Notice of Violation letter previously sent.

The following entry point(s) are used on a limited basis as per the terms of the Compliance Agreement (CA) between your water system and the Minnesota Department of Health (MDH). Consumers will be notified of the radionuclide concentrations and the use of flow-weighted averaging for compliance, annually, in your Consumer Confidence Report (CCR). It is understood that if the allowed number of gallons pumped from the flow-weighted well(s) is exceeded, if required information is not reported on the CCR, or if the CA is not updated annually, a Notice of Violation will be issued. The following is a summary of the most recent results:

Sampling Site: Well #3 Entry Point

Contaminant: **Combined Radium (-226 & -228)**

MCL: >5 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
07/28/2025	4.60	pCi/L	25G2453-01	5.0
06/12/2025	5.40	pCi/L	25F0883-01	5.2

Contaminant: **Gross Alpha in Water**

MCL: >15 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
07/28/2025	13.00	pCi/L	25G2453-01	14.5
06/12/2025	16.00	pCi/L	25F0883-01	12.1

Due to the use of flow-weighted averaging as outlined in the signed CA, your water system is currently in a 'compliance' status. Monitoring on this entry point will be performed semi-annually to ensure radiochemical levels remain within acceptable levels as outlined in your CA. Other entry points involved in flow-weighted averaging calculations, as mentioned in the CA, will be monitored annually. Those results are below. The CA will be updated annually to reflect changes within the water system.

Sampling Site: Well #1 Entry Point

Contaminant: **Combined Radium (-226 & -228)**

MCL: >5 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
07/28/2025	3.60	pCi/L	25G2454-01	3.6

Contaminant: **Gross Alpha in Water**

MCL: >15 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
07/28/2025	7.10	pCi/L	25G2454-01	7.1

Sampling Site: Well #2 Entry Point

Contaminant: **Combined Radium (-226 & -228)**

MCL: >5 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
07/28/2025	2.60	pCi/L	25G2454-02	2.6

Contaminant: **Gross Alpha in Water**

MCL: >15 pCi/L

<u>Date Collected</u>	<u>Results</u>	<u>Units</u>	<u>Sample#</u>	<u>Annual Average</u>
07/28/2025	5.80	pCi/L	25G2454-02	5.8

All required radiochemical samples will be collected by your public water system and submitted to the MDH laboratory for analysis. Sample bottle(s) will be mailed to you with a labform and date that you are scheduled to collect your next sample(s). The results will be reported to you as soon as they become available. We will notify you if any action by your system is required.

Wyoming City Council
Page 3
October 16, 2025
PWSID 1130018

This report should be placed in your records and a copy maintained on or near the water system premises and available for public inspection for not less than ten (10) years. If you have any questions, please contact Allison Dodge at (651) 201-5278 or email allison.dodge@state.mn.us.

Sincerely,

A handwritten signature in black ink that reads "Kim Larsen". The signature is written in a cursive style with a large, sweeping initial "K".

Kim Larsen, P.E., Supervisor
Community Public Water Supply Unit
Environmental Health Division
4140 Thielman Lane, Suite 101
St. Cloud, Minnesota 56301

KAL:AD

Enclosure

cc: Water Superintendent
Allison Dodge, Compliance Officer
Collin Fetters, MDH St. Cloud District Office

PWSID: 1130018
System Name: Wyoming
City: Wyoming

Program Code: HC

Type: I

Date Received: 07/28/25 14:55
Rep. Temp. (°C): 13.3

Collector Name: Dave Torma
Collector ID: None

MDH Sample Number: 25G2453-01

Location ID: E04
Sampling Point: Well #3 Entry Point

Collect Date: 07/28/25
Collect Time: 13:45
Matrix: Drinking Water

Field Residual Chlorine Result: .33
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Gross Alpha	13	3.0	4.2382	pCi/L	B5H1615	08/21/25 14:55	09/05/25 00:00	JJF	EPA 900.0	
Radium-226	2.8	1.0	0.3265	pCi/L	B5I0784	09/04/25 06:28	09/22/25 00:00	MAK	EPA 903.0 Rev 1/ 904.0	

MDH Sample Number: 25G2453-01RE1

Location ID: E04
Sampling Point: Well #3 Entry Point

Collect Date: 07/28/25
Collect Time: 13:45
Matrix: Drinking Water

Field Residual Chlorine Result: .33
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Radium-228	1.8	1.0	0.7013	pCi/L	B5I1292	09/23/25 07:19	09/30/25 13:56	MAK	EPA 903.0 Rev 1/ 904.0	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

Results were produced by Minnesota Department of Health, except where noted.

Batch B5H1615 - Radiochemistry Alpha/Beta Prep

Blank (B5H1615-BLK1)

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	<	3.0	pCi/L							JJF	

LCS (B5H1615-BS1)

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	13.6	3.0	pCi/L	11.60		117	70-130			JJF	

Duplicate (B5H1615-DUP1)

Source: 25G2108-01

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	1.7	3.0	pCi/L		<			21	20	JJF	QT

Matrix Spike (B5H1615-MS1)

Source: 25G2102-01

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	26.4	3.0	pCi/L	11.60	6.7	169	70-130			JJF	M1

Batch B5I0784 - Radiochemistry Ra-226 Ra-228 Prep

Blank (B5I0784-BLK1)

Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	<	1.0	pCi/L							MAK	

LCS (B5I0784-BS2)

Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	4.5	1.0	pCi/L	4.51		100	90-110			MAK	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

Final Report

Results were produced by Minnesota Department of Health, except where noted.

Batch B5I0784 - Radiochemistry Ra-226 Ra-228 Prep

Duplicate (B5I0784-DUP1)

		Source: 25H0648-01			Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00						
Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	1.0	1.0	pCi/L		1.0			4	20	MAK	Z-01

Matrix Spike (B5I0784-MS2)

		Source: 25G2454-01			Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00						
Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	10.1	1.0	pCi/L	9.02	1.4	97	80-120			MAK	

Batch B5I1292 - Radiochemistry Ra-226 Ra-228 Prep

Blank (B5I1292-BLK1)

					Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00						
Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	<	1.0	pCi/L							MAK	Z-01
Radium-228	<	1.0	pCi/L							MAK	

LCS (B5I1292-BS1)

					Prepared: 09/23/25 07:19 Analyzed: 09/30/25 13:56						
Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-228	4.1	1.0	pCi/L	4.45		92	80-120			MAK	

LCS (B5I1292-BS2)

					Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00						
Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	4.3	1.0	pCi/L	4.51		95	90-110			MAK	

Duplicate (B5I1292-DUP1)

		Source: 25G1615-01			Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00						
Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	0.9	1.0	pCi/L		<			0.7	20	MAK	Z-01
Radium-228	0.8	1.0	pCi/L		1.1			33	20	MAK	QT

FINAL REPORT

Report ID: 10142025 81152

Generated: 10/14/2025 8:11:41AM

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

PWSID: 1130018

Results were produced by Minnesota Department of Health, except where noted.

Batch B5I1292 - Radiochemistry Ra-226 Ra-228 Prep

Matrix Spike (B5I1292-MS1)

Source: 25G1802-01

Prepared: 09/23/25 07:19 Analyzed: 09/30/25 13:56

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-228	7.7	1.0	pCi/L	8.90	<	83	70-130			MAK	

Matrix Spike (B5I1292-MS2)

Source: 25G1974-01

Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	9.3	1.0	pCi/L	9.02	<	100	80-120			MAK	Z-01

Data Qualifiers and Definitions

M1	Matrix spike and/or matrix spike duplicate recovery was high; the associated laboratory control sample and/or laboratory control sample duplicate recovery was acceptable.
QT	RPD between sample duplicates not within acceptance limits. Analyte concentration within range for NAD comparison and NAD within acceptance limits.
Z-01	Carrier yield between 110% and 120% with sample DL<1.0 pCi/L Report data.

Work Order Comments

No relinquished signature. -CTS 07/28/25

FINAL REPORT

Report ID: 10142025 81152

Generated: 10/14/2025 8:11:41AM

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

PWSID: 1130018
System Name: Wyoming
City: Wyoming

Program Code: HC

Type: B

Date Received: 07/28/25 14:55
Rep. Temp. (°C): 12.9

Collector Name: Dave Torma
Collector ID: None

MDH Sample Number: 25G2454-01

Location ID: E01
Sampling Point: Well #1 Entry Point

Collect Date: 07/28/25
Collect Time: 13:18
Matrix: Drinking Water

Field Residual Chlorine Result: .33
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Gross Alpha	7.1	3.0	3.0523	pCi/L	B5H1615	08/21/25 14:55	09/05/25 00:00	JJF	EPA 900.0	
Radium-226	1.4	1.0	0.2414	pCi/L	B5I0784	09/04/25 06:28	09/22/25 00:00	MAK	EPA 903.0 Rev 1/ 904.0	

MDH Sample Number: 25G2454-01RE1

Location ID: E01
Sampling Point: Well #1 Entry Point

Collect Date: 07/28/25
Collect Time: 13:18
Matrix: Drinking Water

Field Residual Chlorine Result: .33
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Radium-228	2.2	1.0	1.1570	pCi/L	B5I1292	09/23/25 07:19	09/30/25 13:56	MAK	EPA 903.0 Rev 1/ 904.0	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

PWSID: 1130018

MDH Sample Number: 25G2454-02

Location ID: E02
Sampling Point: Well #2 Entry Point

Collect Date: 07/28/25
Collect Time: 12:57
Matrix: Drinking Water

Field Residual Chlorine Result: .33
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Gross Alpha	5.8	3.0	2.7702	pCi/L	B5H1615	08/21/25 14:55	09/05/25 00:00	JJF	EPA 900.0	
Radium-226	1.1	1.0	0.2162	pCi/L	B5I0784	09/04/25 06:28	09/22/25 00:00	MAK	EPA 903.0 Rev 1/ 904.0	

MDH Sample Number: 25G2454-02RE1

Location ID: E02
Sampling Point: Well #2 Entry Point

Collect Date: 07/28/25
Collect Time: 12:57
Matrix: Drinking Water

Field Residual Chlorine Result: .33
Field Fluoride Result: None
Field pH Result: None
Field PO₄ Result: None

Results were produced by the Minnesota Department of Health, except where noted.

Radiochemical Parameters

Analyte	Result	Reporting Limit	Counting Uncertainty	Units	Batch	Prepared	Analyzed	Init.	Method	Qualifiers
Radium-228	1.5	1.0	0.7586	pCi/L	B5I1292	09/23/25 07:19	09/30/25 13:56	MAK	EPA 903.0 Rev 1/ 904.0	

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

Results were produced by Minnesota Department of Health, except where noted.

Batch B5H1615 - Radiochemistry Alpha/Beta Prep

Blank (B5H1615-BLK1)

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	<	3.0	pCi/L							JJF	

LCS (B5H1615-BS1)

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	13.6	3.0	pCi/L	11.60		117	70-130			JJF	

Duplicate (B5H1615-DUP1)

Source: 25G2108-01

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	1.7	3.0	pCi/L		<			21	20	JJF	QT

Matrix Spike (B5H1615-MS1)

Source: 25G2102-01

Prepared: 08/21/25 14:55 Analyzed: 09/05/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Gross Alpha	26.4	3.0	pCi/L	11.60	6.7	169	70-130			JJF	M1

Batch B5I0784 - Radiochemistry Ra-226 Ra-228 Prep

Blank (B5I0784-BLK1)

Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	<	1.0	pCi/L							MAK	

LCS (B5I0784-BS2)

Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	4.5	1.0	pCi/L	4.51		100	90-110			MAK	

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

Final Report

Results were produced by Minnesota Department of Health, except where noted.

Batch B5I0784 - Radiochemistry Ra-226 Ra-228 Prep

Duplicate (B5I0784-DUP1)

Source: 25H0648-01

Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	1.0	1.0	pCi/L		1.0			4	20	MAK	Z-01

Matrix Spike (B5I0784-MS2)

Source: 25G2454-01

Prepared: 09/04/25 06:28 Analyzed: 09/22/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	10.1	1.0	pCi/L	9.02	1.4	97	80-120			MAK	

Batch B5I1292 - Radiochemistry Ra-226 Ra-228 Prep

Blank (B5I1292-BLK1)

Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	<	1.0	pCi/L							MAK	Z-01
Radium-228	<	1.0	pCi/L							MAK	

LCS (B5I1292-BS1)

Prepared: 09/23/25 07:19 Analyzed: 09/30/25 13:56

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-228	4.1	1.0	pCi/L	4.45		92	80-120			MAK	

LCS (B5I1292-BS2)

Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	4.3	1.0	pCi/L	4.51		95	90-110			MAK	

Duplicate (B5I1292-DUP1)

Source: 25G1615-01

Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	0.9	1.0	pCi/L		<			0.7	20	MAK	Z-01
Radium-228	0.8	1.0	pCi/L		1.1			33	20	MAK	QT

FINAL REPORT

Report ID: 10142025 80015

Generated: 10/14/2025 8:00:08AM

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

PWSID: 1130018

Results were produced by Minnesota Department of Health, except where noted.

Batch B5I1292 - Radiochemistry Ra-226 Ra-228 Prep

Matrix Spike (B5I1292-MS1)

Source: 25G1802-01

Prepared: 09/23/25 07:19 Analyzed: 09/30/25 13:56

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-228	7.7	1.0	pCi/L	8.90	<	83	70-130			MAK	

Matrix Spike (B5I1292-MS2)

Source: 25G1974-01

Prepared: 09/23/25 07:19 Analyzed: 10/13/25 00:00

Analyte	Result	Reporting Limit	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Init.	Qualifiers
Radium-226	9.3	1.0	pCi/L	9.02	<	100	80-120			MAK	Z-01

Data Qualifiers and Definitions

M1	Matrix spike and/or matrix spike duplicate recovery was high; the associated laboratory control sample and/or laboratory control sample duplicate recovery was acceptable.
QT	RPD between sample duplicates not within acceptance limits. Analyte concentration within range for NAD comparison and NAD within acceptance limits.
Z-01	Carrier yield between 110% and 120% with sample DL<1.0 pCi/L Report data.

Work Order Comments

Samples were received in proper condition.

FINAL REPORT

Report ID: 10142025 80015

Generated: 10/14/2025 8:00:08AM

Authorized by:

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Stefan Saravia, Environmental Laboratory Manager
Public Health Laboratory, Minnesota Department of Health

RESOLUTION NO. 25-10-105

**RESOLUTION APPROVING A CONDITIONAL USE PERMIT FOR A COMMERCIAL
KENNEL
AT
6641 LAKE BOULEVARD**

PROPERTY ID NUMBER 21.11069.00

WHEREAS, the City of Wyoming is a political subdivision, organized and existing under the laws of the State of Minnesota; and,

WHEREAS, the City Council of the City of Wyoming has adopted zoning and subdivision regulations, per Ordinances 2009-4 and 2010-08, including subsequent amendments, to promote the orderly, economic and safe development and utilization of land within the City; and,

WHEREAS, Denyce McLaughlin, of Top of the Valley Pet Resort, has applied for a Conditional Use Permit for a commercial kennel providing boarding, daycare, grooming & training.

The property is legally described as:

Lot 2, Block 1, Palmer Heights

WHEREAS, on October 14, 2025, the Planning Commission held a public hearing in accordance with the Ordinance and laws of the State of Minnesota; and,

WHEREAS, the City Council and Planning Commission have reviewed the application, as submitted, and have made the following findings of fact:

1. The use is in conformity with the Comprehensive Plan and development policies of the City.
2. The use will not create an excessive demand on existing parks, schools, streets and other public facilities and utilities which serve or are proposed to serve the area.

3. The use will be sufficiently compatible or separated by distance or screening from adjacent development or land so that existing development will not be depreciated in value and there will be no deterrence to development of vacant land.
4. The structure and site will have an appearance that will not have an adverse effect upon adjacent properties.
5. The use in the opinion of the City is reasonably related to the overall needs of the City and to the existing land use.
6. The use will be consistent with the purpose of this and other City Ordinances.
7. The use will be located, designed, maintained, and operated to be compatible with the existing or intended character of the zoning district in which it is to be located.
8. The use will generate only minimal vehicular traffic on local streets and shall not create traffic hazards or unsafe access or parking needs.
9. Existing businesses nearby will not be adversely affected because of the curtailment of customer trade brought about by intrusion of noise, glare, or general unsightliness.
10. The establishment or maintenance of the use shall not be detrimental to the public, health, safety, or general welfare.
11. The use will not be hazardous, detrimental, or disturbing to present and potential surrounding land use due to water pollution, odor, fumes, general unsightliness or other nuisances.
12. The use will preserve and incorporate the site's important natural and scenic features into the development design.
13. The use will cause minimal adverse environmental effects.

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Wyoming hereby **APPROVES** the Conditional Use Permit, as requested by the applicant with the following conditions:

1. The applicant shall maintain all site vegetation in the rear of the site and along property lines.
2. The applicant may install a fence in the rear of the building so long as existing vegetation remains or new vegetation is established.
3. If determined by the City, based upon on-site parking demand, the applicant shall install additional parking stalls for city review and approval prior to their installation.
4. The property needs to comply with all applicable local, state and federal regulations necessary for operation of a commercial kennel, including meeting all zoning ordinance requirements
5. The applicant shall submit a lighting plan that complies with all standards in ordinance lighting requirements Article VII, Division 15.

6. The applicant shall comply with ordinance lighting requirements including turning off site lighting, except for security lighting one (1) hour after closing.
7. The applicant shall determine whether the existing septic system will have enough capacity to treat the wastewater produced and will increase the size of the system if necessary.
8. The applicant shall comply with the City Noise Ordinance requirements.
9. If installed, outdoor speakers shall not be located within two hundred (200) feet of any residentially zoned or used property, nor within one hundred (100) feet of any adjacent lot used or zoned non-residential.

ADOPTED BY THE CITY COUNCIL OF THE CITY OF WYOMING THIS 21st DAY OF OCTOBER, 2025.

Lisa Iverson, Mayor

ATTEST:

This Document Drafted by:
The City of Wyoming
26885 Forest Boulevard
Wyoming, Minnesota 55092

Robb Linwood, City Administrator

**CITY OF WYOMING
PLANNING AND ZONING**

TO:	
DATE	10/15/2025
MEETING DATE:	10/21/2025
FROM:	Kim Lindquist, City Planner Fred Weck, Zoning Administrator
RE:	Conditional Use Permit for Top of the Valley Pet Resort
APPLICANT:	Denyce McLaughlin
PROPERTY OWNER:	Damarco LLC
PROPERTY:	6641 Lake Blvd
FILE NO.:	C-25-006

OVERVIEW

The applicant, Top of the Valley Pet Resort has applied to locate in the existing 2,000 square foot building at 6641 Lake Street. The proposed use is boarding, daycare, grooming and training center for dogs. The applicant intends to have outdoor space of approximately 30,000 square feet to the rear of the building, which will be fenced. By ordinance a commercial dog kennel is any place where four (4) or more dogs or domestic pets over four (4) months of age are kept, boarded, bred, trained and/or offered for sale, except in the case of a veterinary clinic. A conditional use permit is required for approval of the use at the site.

The property is presently developed as a commercial site and has six parking stalls in the front, along Hwy 8. The entire site is 2.83 acres although a good portion of the parcel is located within the Hwy 8 right of way and boulevard. There is ample land available for additional parking should the applicant experience additional demand as a result of the pet resort. As noted, there is also an area to have pets outside.

One final item for discussion is that there is another application for the same property on the Commission's agenda. This use is a conditional use and the other, a cannabis retailer is an interim conditional use. It is recommended that the City approve the requests, if appropriate, and the property owner can determine which use will go into the building. The City should revoke the other permit after the determination.

SITE CHARACTERISTICS

The property is approximately 2.83 acres and is comprised of one tax parcel. The property is located at the intersection of Hwy 8 and Greenway Avenue, in the northeast corner. The building is located in the north, with parking in front of the building. Access to the site is from Greenway. The applicant does not anticipate any changes to the site

with the exception of fencing a large area in the back of the site. Google Map shows a fence currently on the site.

The ordinance requires thirteen (13) conditions be met for granting a conditional use permit in the rural residential district.

STAFF RECOMMENDATION

The requirements of Chapter 40, Article V, Division 6, “Conditional Use Permits”, Section 40-112 and Chapter 40, Article VI, Division 16 “Notification of Variance and Conditional Uses” as contained in the city of Wyoming Ordinance have been complied with. Staff is recommending approval of a Conditional Use Permit for a pet resort which has boarding, daycare, grooming and training of dogs on the subject property based upon the findings of fact and subject to the following conditions.

1. The applicant shall maintain all site vegetation in the rear of the site and along property lines.
2. The applicant may install a fence in the rear of the building so long as existing vegetation remains or new vegetation is established.
3. If determined by the City, based upon on-site parking demand, the applicant shall install additional parking stalls for city review and approval prior to their installation.
4. The property needs to comply with all applicable local, state and federal regulations necessary for operation of a commercial kennel, including meeting all zoning ordinance requirements

STAFF REVIEW

General Comprehensive Plan and Zoning Review

The subject property is zoned C-Commercial and is guided for Commercial uses in the Comprehensive Plan.

The zoning and surrounding guided uses are as follows:

North – C – Commercial use

South – Excess right of way and residential south of Greenway Lane

West – US Hwy 61

East – R1- Rural Residential

Conditional Use Permit Standards

Chapter 40, Article V, Division 6, Conditional Use Permits, Section 40 – 112, sets forth the general standards that shall be met in order to grant a CUP. Granting of a Conditional Use Permit is required for a commercial dog kennel use in the C-Commercial zoning district. The standards are as follows:

1. The use is in conformity with the Comprehensive Plan and development policies of the City.

- The proposed use is consistent with the commercial zoning designation and is allowed as a conditional use in the commercial district. The 2022 Comprehensive Plan guides this parcel for Commercial, Industrial and General Business use.*
2. The use will not create an excessive demand on existing parks, schools, streets and other public facilities and utilities which serve or are proposed to serve the area.
The use will not create an excessive demand on existing parks, schools, streets and other public facilities and utilities.
 3. The use will be sufficiently compatible or separated by distance or screening from adjacent development or land so that existing development will not be depreciated in value and there will be no deterrence to development of vacant land.
The use will be compatible with adjacent land uses as the site is already developed as a commercial property. The property immediately adjacent, to the east, is also commercial. There is residential development in the east, to the rear of the site, although the residence is located in the central portion of the site and is approximately 490' away from the building and approximately 250' from the rear property line.
 4. The structure and site will have an appearance that will not have an adverse effect upon adjacent properties.
The site is already developed, and the applicant does not propose any changes to the site with the exception of fence installation.
 5. The use will be consistent with the purpose of this and other City Ordinances.
The ordinance currently allows this use if it can comply with ordinance CUP standards.
 6. The use will be located, designed, maintained, and operated to be compatible with the existing or intended character of the zoning district in which it is to be located.
The proposed commercial kennel is consistent and compatible with the character of the commercial zoning.
 7. The use will generate only minimal vehicular traffic on local streets and shall not create traffic hazards or unsafe access or parking needs.
The anticipated use will generate reasonable traffic for a commercial use. The site gains access off of Greenway Ave from Hwy 8, which is designated for higher traffic volumes. Parking is on site and there is additional area to install more parking if needed.
 8. Existing businesses nearby will not be adversely affected because of the curtailment of customer trade brought about by intrusion of noise, glare, or general unsightliness.
The proposal does not impact existing nearby businesses.
 9. The establishment or maintenance of the use shall not be detrimental to the public, health, safety, or general welfare.
The operation of the commercial kennel should not be detrimental to the public health, safety, or general welfare.
 10. The use will not be hazardous, detrimental, or disturbing to present and potential surrounding land use due to water pollution, odor, fumes, general unsightliness, or other nuisances.
The use will not negatively affect the property or the surrounding land uses relating to water pollution, odor, or fumes.

11. The use will preserve and incorporate the site's important natural and scenic features into the development design.
The site has some existing vegetation in the rear of the site, along the property lines. That vegetation should be maintained and it is a condition of approval.
12. The use will cause minimal adverse environmental effects.
The proposal should not cause any adverse environmental effects to the site.

Staff finds that the application meets all of the CUP standards for approval.

Planning Commission Recommendation

On October 14, 2025 the Planning Commission publicly heard the petitioner's request for a Conditional Use Permit to operate a commercial kennel. After hearing testimony and discussion, the Planning Commission voted unanimously to recommend approval of the request based on the findings that the standards for the Conditional Use Permit have been met and with the following conditions:

1. The applicant shall maintain all site vegetation in the rear of the site and along property lines.
2. The applicant may install a fence in the rear of the building so long as existing vegetation remains or new vegetation is established.
3. If determined by the City, based upon on-site parking demand, the applicant shall install additional parking stalls for city review and approval prior to their installation.
4. The property needs to comply with all applicable local, state and federal regulations necessary for operation of a commercial kennel, including meeting all zoning ordinance requirements

Following public comment from adjoining property owners Staff is recommending the following additional conditions:

5. The applicant shall submit a lighting plan that complies with all standards in ordinance lighting requirements Article VII, Division 15.
6. The applicant shall comply with ordinance lighting requirements including turning off site lighting, except for security lighting one (1) hour after closing.
7. The applicant shall determine whether the existing septic system will have enough capacity to treat the wastewater produced and will increase the size of the system if necessary.
8. The applicant shall comply with the City Noise Ordinance requirements.
9. If installed, outdoor speakers shall not be located within two hundred (200) feet of any residentially zoned or used property, nor within one hundred (100) feet of any adjacent lot used or zoned non-residential.



City Of Wyoming
26885 Forest Blvd, PO Box 188
Wyoming, MN 55092
Phone (651) 462-4947
permits@wyomingmn.org

LAND USE APPLICATION: CONDITIONAL & INTERIM USE PERMIT

A conditional use permit application requests a use permitted in a particular zoning district, but regulated and controlled through conditions placed upon it by the City Council after review by the Planning Commission.

Property Address: 6641 Lake Blvd. Wyoming MN 55092

Applicant(s): Name(s) Top of the Valley Pet Resort - Denyce + Francis

Address 2217 150th Avenue MCLAUGHLIN

City Saint Croix Falls State WI Zip 54024

Phone Number personal cell Email [REDACTED]

Owner(s) - If other than Applicant(s):

Name(s) _____

Address _____

City _____ State _____ Zip _____

Phone Number _____ Email _____

Owner(s) Signature(s) [Signature] Date 9/18/25

Legal description of property: Section 33 Twp 033 Range 021-Subdivision Palmer Heights

Property Identification Number: R.21 LOT 002-BLOCK 001 Present Zoning: Commercial

Present use of property: n/a subdivision CO 10360

Proposed use of property: Boarding, Daycare, Grooming & Training

Is this an application for an Interim Use permit? ☐ Yes ☒ No If yes, on what date, or upon what event, would the applicant

desire the interim use to expire? Date: ____ / ____ / ____ OR Event: _____

This application and the following attachments must be submitted to be considered a complete application:

A detailed site plan showing the following information from Sec. 40 - 111, A-K also including:

- The grading and drainage plan must be designed in accordance with Article VII, Division 21 of the Zoning Ordinance and the City Of Wyoming Surface Water Resource Guidance Document
 - Elevation drawings of all sides of the proposed building to show compliance with the architectural standards of the zoning district the use will be located in
 - Landscaping and Screening in accordance with Article VII, Divisions 14 & 26
 - Lighting Plan in accordance with Article VII, Division 15
- A letter explaining the proposed use and how it will be operated
 - A completed Conditional & Interim Use Permit Worksheet
 - Applications for uses described in Article VI, Divisions 7, 18 & 19 and Article VII, Divisions 2, 8, 10, 17-20 & 25 of the Zoning Ordinance. It must include the information necessary to show compliance with the applicable section of the ordinance.
 - Applications for uses that are within the Highway 8 Overlay District or that utilize Highway 8 for access must include the information necessary to show compliance with Article VI, Division 14 of the Zoning Ordinance
 - The application fee and escrow must be paid at the time of application - The fee is **not** refundable and the unused portion of the escrow will be returned to the applicant.
 - Any other information deemed necessary by the Zoning Administrator or Planning Commission

Applicant(s) Signature(s) [Signature] Date 9/17/2025

As the applicant for this request, I agree to reimburse the City for all expenses incurred by the City in employing planning, engineering, legal, and other professional consultants in reviewing this application. This may include the replenishment of any escrow funds as required as part of this application. Such costs shall be paid by me, the applicant, regardless of the outcome of the review and prior to commencing any work on the project. All of Article V, Division 6, Conditional Use Permits, and Article VII, Division 13, Home Occupations are attached to this application and by signing this application, the Applicant acknowledges that they have been read and understood.

A public hearing can be scheduled only after a complete application has been received.

OFFICE USE ONLY

Date Complete Application Received 9/18/25

Fee: **\$220.00 + Escrow**

Escrow - Commercial is \$1,000.00 & Residential is \$750.00

Application # C25-006

60 Days 11/17/25

Date Paid 9/17/25

Date Application Received 9/17/25

By: [Signature]

Check # [REDACTED]

Revised 01/24/23

CONDITIONAL & INTERIM USE PERMIT WORKSHEET

Applicant: Top of the Valley Pet Resort - Deryce + Francis McLaughlin
Address: 6641 Lake Blvd. Wyoming, MN 55092
Type of Business: Pet Resort offering Luxury boarding, Daycare, Grooming +
Business name: TOP of the Valley Pet Resort training

Answer the following questions based on the standards contained in Sec. 40 – 112 of the City of Wyoming Zoning Ordinance for Conditional and Interim Use Permits. If needed, use a separate page. **All questions must be answered.**

1. Is your proposed use in conformity with the Comprehensive Plan and development policies of the City?
☒ Yes ☐ No Explain: _____
2. Will your proposed use create an excessive demand on existing parks, schools, streets and other public facilities and utilities which serve or are proposed to serve the area?
☐ Yes ☒ No Explain: _____
3. Will your proposed use be sufficiently compatible or separated by distance or screening from adjacent development or land so that existing development will not be depreciated in value and so there will be no deterrence to development of vacant land?
☒ Yes ☐ No Explain: _____
4. Will the structure and site have an appearance that will not have an adverse effect upon adjacent properties?
☒ Yes ☐ No Explain: _____
5. Is the proposed use reasonably related to the overall needs of the City and to the existing land use?
☒ Yes ☐ No Explain: _____
6. Will the proposed use be consistent with the purpose of the Zoning Ordinance and other City Ordinances?
☒ Yes ☐ No Explain: _____
7. Will the proposed use be located, designed, maintained, and operated to be compatible with the existing or intended character of the zoning district in which it is to be located?
☒ Yes ☐ No Explain: _____
8. Will the proposed use generate only minimal vehicular traffic on local streets?
☒ Yes ☐ No Explain: _____
9. Will the proposed use create traffic hazards or unsafe access or parking needs?
☐ Yes ☒ No Explain: _____
10. Will existing businesses nearby be adversely affected by your proposed use because of the curtailment of customer trade brought about by intrusion of noise, glare, or general unsightliness?
☐ Yes ☒ No Explain: _____
11. Will the establishment or maintenance of the proposed use be detrimental to the public health, safety or general welfare?
☐ Yes ☒ No Explain: _____
12. Will the proposed use be hazardous, detrimental, or disturbing to present and potential surrounding land uses due to water pollution, odor, fumes, and general unsightliness or other nuisances?
☐ Yes ☒ No Explain: _____
13. How will the proposed use preserve and incorporate the site's important natural and scenic features into the development design?
☒ Yes ☐ No Explain: _____
14. Will the proposed use cause adverse environmental effects?
☐ Yes ☒ No Explain: _____

Application # _____

Revised 01/24/23

Top of the Valley Pet Resort

Denyce McLaughlin

2217 150th Ave.

St. Croix Falls, WI 54024

Personal Cell: [REDACTED]

Business Phone: [REDACTED]

Email: [REDACTED]

September 17, 2025

City of Wyoming

Planning & Zoning Department or Appropriate Contact

26885 Forest Boulevard

Wyoming, MN 55092

Re: Top of the Valley Pet Resort – Proposed Location at 6641 Lake Blvd

Dear Mayor, City Council, and Planning Commission Members,

I established Top of the Valley Pet Resort in 2023 after many years of raising, breeding, showing, and training Golden Retrievers, as well as boarding the dogs I had bred. With that deep background in professional handling and grooming, I decided to open our doors to the public—and we haven't looked back.

Over the past two years, we've grown into a trusted full-service pet-care destination, providing boarding, daycare, grooming, and training. Our team of nine dedicated staff members shares my commitment to exceptional care and customer service.

Our work has been recognized by the community in many ways. Top of the Valley has been voted **Best Boarding Kennel** for the past two years and, in 2025, also earned awards for **Best Groomer** and **Best Customer Service**. We are proud to have recently received **Best Boarding Kennel** honors in the Amery area as well. These distinctions reflect the consistent, high-quality care that our clients and their pets have come to expect.

Our goal in opening a Wyoming location is to serve the growing needs of pet owners throughout Chisago County. The new facility will offer the same professional services and welcoming atmosphere that have earned us the trust of our Wisconsin customers. We envision a modern, well-designed building with spacious kennels, indoor and outdoor play areas, and top-tier grooming and training services, all with a focus on safety, cleanliness, and enrichment.

I encourage you to visit our website to see more about who we are and the passion behind our work. We currently feature an ad at the local movie theater and have additional newspaper features scheduled to run soon. We also maintain an active presence on Facebook, where our community can easily follow our latest updates and events. I believe

that by viewing our current location and learning more about us online, you will quickly see the dedication and enthusiasm we bring to every aspect of pet care.

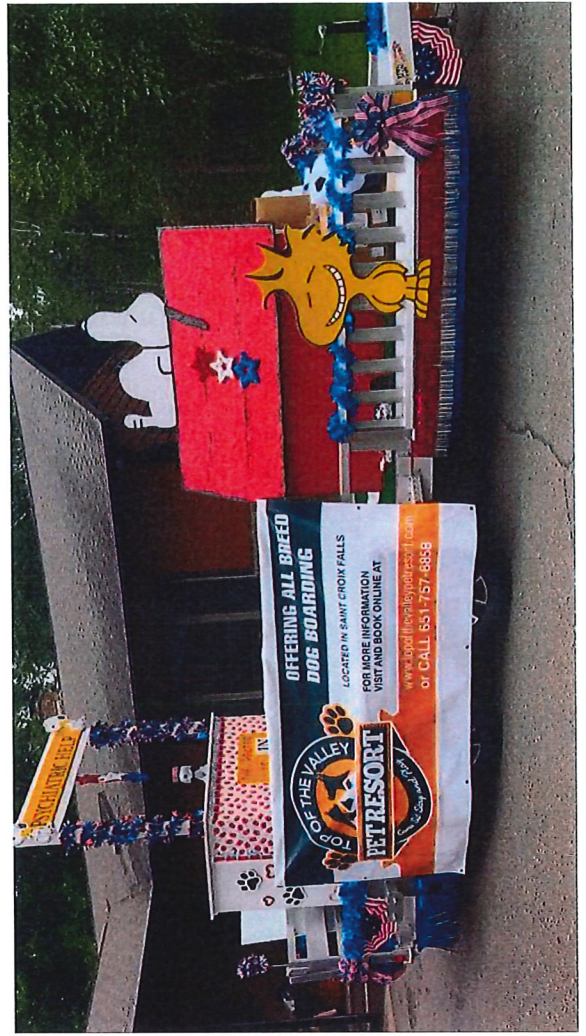
We believe this project will be a valuable addition to the community—creating local jobs, attracting visitors, and providing a much-needed resource for pet owners in the Highway 8 corridor. We are excited about the opportunity to partner with the City of Wyoming and ensure our plans align with your vision for responsible development.

Thank you for considering our proposal. I welcome the chance to answer any questions or provide further details about our plans and experience.

Sincerely,

Denyce McLaughlin
Owner & Founder





**CITY OF WYOMING
PLANNING AND ZONING**

TO:	City Council
DATE	10/15/2025
MEETING DATE:	10/21/2025
FROM:	Kim Lindquist, City Planner Fred Weck, Zoning Administrator
RE:	Interim Use Permit for Retail Cannabis
APPLICANT:	Billy Lavell for 10,000 Bakes LLC
PROPERTY OWNER:	Damarco LLC
PROPERTY:	6641 Lake Blvd
FILE NO.:	I-25-006

OVERVIEW

The applicant, Billy Lavell, representing 10,000 Bakes LLC, has applied to locate into the existing 2,000 square foot building at 6641 Lake Boulevard. The applicant has obtained a license through the Office of Cannabis Management (OCM) that allows businesses to start reach out to cities to secure locations. The proposed use is cannabis retail that will provide retail sales of legal cannabis products to adults ages 21 and over. Per the adopted Ordinance No. 2024-01 Sec. 5 a commercial cannabis retailer is permitted as an interim use in the C-Commercial district. For the Commission's information, it is also permitted as an interim use in the following zoning districts:

1. Central business (CBD)
2. Commercial (C) District
3. Office and Health Care (OHC) District
4. Mixed Use (MXD) District.

The property is presently developed as a commercial site and has 6 parking stalls in the front, along Hwy 8. The entire site is 2.83 acres although a good portion of the parcel is located within the Hwy 8 right of way and boulevard. Per Sec. 40-682 of the ordinance parking standards, retail and sales require 5 spaces per 1000 sq. ft. of gross floor area and 1 space for each additional 50,000 sq feet of gross floor area. Under the ordinance ten spaces would be required on the site, meaning the applicant would have to add an additional 4 stalls.

One final item for discussion is that there is another application for the same property on the Commission's agenda. This use is an interim use and the other, a pet resort is a conditional use. It is recommended that the City approve the requests, if appropriate, and the property owner can determine which use will go into the building. The City should revoke the other permit after the determination.

SITE CHARACTERISTICS

The property is approximately 2.83 acres and is comprised of one tax parcel. The property is located at the intersection of Hwy 8 and Greenway Ave. in the northeast corner. The building is located in the north, with parking in front of the building. Access to the site is from Greenway Ave. The applicant does not anticipate any changes to the site apart from interior improvements and exterior painting.

STAFF RECOMMENDATION

Requirements of Ordinance NO. 2024-01. City Code Sec. 40-682 Staff is recommending approval of an Interim Use Permit for the proposed cannabis retail which will provide retail sales of legal cannabis products to adults ages 21 and over based upon findings of fact and subject to the following conditions.

1. The applicant shall maintain all site vegetation at the rear of the site along property lines.
2. The applicant shall install the additional 4 parking stalls to come into compliance with Ord. 40-682.
3. The property needs to comply with all applicable local, state and federal regulations necessary for operation of a retail cannabis business including meeting all zoning ordinance requirements.
4. The IUP will terminate upon sale of the property, a change in business ownership or if the applicant does not maintain his license through the Office of Cannabis Management.

STAFF REVIEW

General Comprehensive Plan and Zoning Review

The Commercial (C) district is designed and intended to promote the development of retail and service businesses that require volumes of automobile traffic. This district encourages many uses that reinforce and complement uses permitted in the (CBD) district. The subject property is zoned Commercial and is guided for commercial use.

The zoning and surrounding guided uses are as follows:

North – C - Commercial

South – R2 – Rural Residential 2

West – R2 – Rural Residential 2

East – C – Commercial

Conditional Use Permit Standards

Chapter 40, Article V, Division 6, Conditional Use Permits, Section 40 – 112, sets forth the general standards that shall be met in order to grant a CUP. Granting a Conditional Use Permit is required for commercial business use in the C-Commercial zoning district. These standards, along with four additional conditions, must be met for approval of an interim use permit. The standards are as follows:

1. The use is in conformity with the Comprehensive Plan and development policies of the City.

Response: *The proposed use is consistent with the commercial zoning designation and is allowed as an Interim use in the commercial district. .*

2. The use will not create an excessive demand for existing parks, schools, streets and other public facilities and utilities which serve or are proposed to serve the area.

Response: *The use will not create an excessive demand for existing parks, schools, streets and other public facilities and utilities.*

3. The use will be sufficiently compatible or separated by distance or screening from adjacent development or land so that existing development will not be depreciated in value and there will be no deterrence to development of vacant land.

Response: *The use will be compatible with adjacent land uses as the site is already developed as a commercial property. The property immediately adjacent to the east is also commercial. There is residential development in the south, to the rear of the site, although the residence is located in the central portion of the site and is approximately 490' away from the building and approximately 250' from the rear property line.*

4. The structure and site will have an appearance that will not have an adverse effect upon adjacent properties.

Response: *The site is already developed, and the applicant does not propose any changes to the site apart from minor interior and exterior updates, including an increase in the number of parking stalls.*

5. The use will be consistent with the purpose of this and other City Ordinances.

Response: *The ordinance currently allows this use if it can comply with ordinance IUP standards.*

6. The use will be located, designed, maintained, and operated to be compatible with the existing or intended character of the zoning district in which it is to be located.

Response: *The proposed commercial retail is consistent and compatible with the character of the commercial zoning.*

7. The use will generate only minimal vehicular traffic on local streets and shall not create traffic hazards or unsafe access or parking needs.

Response: *The anticipated use will generate reasonable traffic for a commercial use. The site gains access from Greenway Ave and Hwy 8, which is designated for higher traffic volumes. Parking is on site and there is additional area to install more parking as required.*

8. Existing businesses nearby will not be adversely affected because of the curtailment of customer trade brought about by intrusion of noise, glare, or general unsightliness.

Response: *The proposal does not impact existing nearby businesses.*

9. The establishment or maintenance of the use shall not be detrimental to the public, health, safety, or general welfare.

Response: *The operation of the commercial business should not be detrimental to the public health, safety, or general welfare.*

10. The use will not be hazardous, detrimental, or disturbing to present and potential surrounding land use due to water pollution, odor, fumes, general unsightliness, or other nuisances.

Response: *The use will not negatively affect the property or the surrounding land uses relating to water pollution, odor, or fumes.*

11. The use will preserve and incorporate the site's important natural and scenic features into the development design.

Response: *The site has some existing vegetation in the rear of the site, along the property lines. That vegetation should be maintained, and it is a condition of approval.*

12. The use will cause minimal adverse environmental effects.

Response: *The proposal should not cause any adverse environmental effects to the site.*

Interim Use Permit Standards

Chapter 40, Article V, Division 6, Interim Use Permit, Section 40 – 112, sets forth the general standards that shall be met in order to grant an IUP. Granting of an Interim Use Permit is required for Cannabis Retail use in the C-Commercial zoning district. The standards are as follows:

1. Whether the use conforms to the zoning regulation.

Response: *The use conforms to the current zoning regulation.*

2. Whether a date or event for the termination of the use can be identified with certainty.

Response: *The application did not provide a termination date. Staff is recommending that the IUP be terminated with a change of owner, sale of the property, or loss of the State license.*

3. Whether the permission of the use will impose additional costs on the public if it is necessary for the public to take the property in the future.

Response: *The permission will not impose additional costs to the public.*

4. Whether the landowner will agree to the conditions that the City Council deems appropriate for permission of the use

Response: *Proposed conditions are a requirement of approval.*

Staff find that the application meets all the CUP and IUP standards for approval.

Planning Commission Recommendation

On October 14, 2025 the Planning Commission publicly heard the petitioner's request for an Interim Conditional Use Permit to allow a cannabis retail store at the location. After hearing testimony and discussion, the Planning Commission voted unanimously to

recommend approval of the request based on the findings that the standards for the Interim Conditional Use Permit have been met and with the following conditions:

1. The applicant shall maintain all site vegetation at the rear of the site along property lines.
2. The applicant shall install the additional 4 parking stalls to come into compliance with Ord. 40-682.
3. The property needs to comply with all applicable local, state and federal regulations necessary for operation of a retail cannabis business including meeting all zoning ordinance requirements.
4. The IUP will terminate upon sale of the property, a change in business ownership or if the applicant does not maintain his license through the Office of Cannabis Management.

Following public comment from adjoining property owners Staff is recommending the following additional conditions:

5. The applicant shall submit a lighting plan that complies with all standards in ordinance lighting requirements Article VII, Division 15.
6. The applicant shall comply with ordinance lighting requirements including turning off site lighting, except for security lighting one (1) hour after closing.
7. The applicant shall comply with the City Noise Ordinance requirements.
8. If installed, outdoor speakers shall not be located within two hundred (200) feet of any residentially zoned or used property, nor within one hundred (100) feet of any adjacent lot used or zoned non-residential.



Rose Vannelli
HRGO Tech
City of Wyoming
26885 Forest Blvd, PO Box 188
Wyoming, MN 55092
Phone (651) 462-4947
permits@wyomingmn.org

LAND USE APPLICATION: CONDITIONAL & INTERIM USE PERMIT

A conditional use permit application requests a use permitted in a particular zoning district, but regulated and controlled through conditions placed upon it by the City Council after review by the Planning Commission.

Property Address: 6641 Lake Boulevard, Forest Lake, MN 55025

Applicant(s): Name(s) Billy Lavell

Address 52 Douglas Street Apartment #2

City St. Paul State MN Zip 55102

Phone Number [REDACTED] Email [REDACTED]

Owner(s) - If other than Applicant(s):

Name(s) Damapo LLC

Address 851 8th Ave SE

City Forest Lake State MN Zip 55025

Phone Number [REDACTED] Email [REDACTED]

Owner(s) Signature(s) [Signature] Date 9/22/25

Legal description of property: Sec 33 Township 033 Range 021 Subdivision Palmer Heights Lot 002 Block 001

Property Identification Number: R.21.11069-00 Present Zoning: Retail *subdivision 10360*

Present use of property: Vacant

Proposed use of property: Cannabis Retail

Is this an application for an Interim Use permit? ☒ Yes ☐ No If yes, on what date, or upon what event, would the applicant desire the interim use to expire? Date: / / OR Event: Change of ownership

This application and the following attachments must be submitted to be considered a complete application:

A detailed site plan showing the following information from Sec. 40 - 111, A-K also including:

- The grading and drainage plan must be designed in accordance with Article VII, Division 21 of the Zoning Ordinance and the City Of Wyoming Surface Water Resource Guidance Document
 - Elevation drawings of all sides of the proposed building to show compliance with the architectural standards of the zoning district the use will be located in
 - Landscaping and Screening in accordance with Article VII, Divisions 14 & 26
 - Lighting Plan in accordance with Article VII, Division 15
- A letter explaining the proposed use and how it will be operated
 - A completed Conditional & Interim Use Permit Worksheet
 - Applications for uses described in Article VI, Divisions 7, 18 & 19 and Article VII, Divisions 2, 8, 10, 17-20 & 25 of the Zoning Ordinance. It must include the information necessary to show compliance with the applicable section of the ordinance.
 - Applications for uses that are within the Highway 8 Overlay District or that utilize Highway 8 for access must include the information necessary to show compliance with Article VI, Division 14 of the Zoning Ordinance
 - The application fee and escrow must be paid at the time of application - The fee is **not** refundable and the unused portion of the escrow will be returned to the applicant.
 - Any other information deemed necessary by the Zoning Administrator or Planning Commission

Applicant(s) Signature(s) [Signature] Date 9/22/25

As the applicant for this request, I agree to reimburse the City for all expenses incurred by the City in employing planning, engineering, legal, and other professional consultants in reviewing this application. This may include the replenishment of any escrow funds as required as part of this application. Such costs shall be paid by me, the applicant, regardless of the outcome of the review and prior to commencing any work on the project. All of Article V, Division 6, Conditional Use Permits, and Article VII, Division 13, Home Occupations are attached to this application and by signing this application, the Applicant acknowledges that they have been read and understood.

A public hearing can be scheduled only after a complete application has been received.

OFFICE USE ONLY

Date Complete Application Received 9/22/25

Fee: \$220.00 + Escrow

Application # 1-25-003

60 Days 11/21/25

Date Paid 9/22/25

Date Application Received 9/22/25

By: [Signature]

Check # CC

CONDITIONAL & INTERIM USE PERMIT WORKSHEET

Applicant: Billy Lavell
Address: 52 Douglas Street Apartment #2
Type of Business: Retail Dispensary
Business name: 10,000 Bakes LLC

Answer the following questions based on the standards contained in Sec. 40 – 112 of the City of Wyoming Zoning Ordinance for Conditional and Interim Use Permits. If needed, use a separate page. **All questions must be answered.**

1. Is your proposed use in conformity with the Comprehensive Plan and development policies of the City?
☒ Yes ☐ No Explain: Site complies with Ordinances
2. Will your proposed use create an excessive demand on existing parks, schools, streets and other public facilities and utilities which serve or are proposed to serve the area?
☐ Yes ☒ No Explain: _____
3. Will your proposed use be sufficiently compatible or separated by distance or screening from adjacent development or land so that existing development will not be depreciated in value and so there will be no deterrence to development of vacant land?
☒ Yes ☐ No Explain: Interior Improvements & Exterior Painting
4. Will the structure and site have an appearance that will not have an adverse effect upon adjacent properties?
☐ Yes ☒ No Explain: _____
5. Is the proposed use reasonably related to the overall needs of the City and to the existing land use?
☒ Yes ☐ No Explain: _____
6. Will the proposed use be consistent with the purpose of the Zoning Ordinance and other City Ordinances?
☒ Yes ☐ No Explain: _____
7. Will the proposed use be located, designed, maintained, and operated to be compatible with the existing or intended character of the zoning district in which it is to be located?
☒ Yes ☐ No Explain: _____
8. Will the proposed use generate only minimal vehicular traffic on local streets?
☒ Yes ☐ No Explain: _____
9. Will the proposed use create traffic hazards or unsafe access or parking needs?
☐ Yes ☒ No Explain: _____
10. Will existing businesses nearby be adversely affected by your proposed use because of the curtailment of customer trade brought about by intrusion of noise, glare, or general unsightliness?
☐ Yes ☒ No Explain: _____
11. Will the establishment or maintenance of the proposed use be detrimental to the public health, safety or general welfare?
☐ Yes ☒ No Explain: _____
12. Will the proposed use be hazardous, detrimental, or disturbing to present and potential surrounding land uses due to water pollution, odor, fumes, and general unsightliness or other nuisances?
☐ Yes ☒ No Explain: _____
13. How will the proposed use preserve and incorporate the site's important natural and scenic features into the development design?
☒ Yes ☐ No Explain: _____
14. Will the proposed use cause adverse environmental effects?
☐ Yes ☒ No Explain: _____

Application # _____

Revised 01/24/23

Site Plan

Proposed Conditional Use

Address: 6641 Lake Boulevard, Forest Lake, MN 55025

Proposed Use: Retail Marijuana Dispensary

Narrative:

The applicant proposes to operate a state-licensed adult-use marijuana dispensary at the commercial property located at 6641 Lake Boulevard, Forest Lake, MN 55025. The Interim Use will fully comply with Minnesota Statutes Chapter 342, applicable rules adopted by the Office of Cannabis Management, and all local ordinances and licensing requirements established by the City and State.

The dispensary will provide retail sales of legal cannabis products to adults aged 21 and over. All products sold will be sourced, tested, stored, labeled, and tracked in accordance with state regulations.

Operations and Compliance:

☐ Hours of Operation:

Monday through Sunday: In accordance with City Ordinances

☐ Security:

The business will implement a robust security program using Verkada alarm and camera systems and 360 Security for active surveillance and alarm monitoring. The building will comply with state security requirements (MN Rule 9810.1500), including restricted access, intrusion alarms, and storage protocols.

☐ Point of Sale and Transaction Safety:

Transactions will be securely processed using the Dutchie POS system, providing encrypted financial tracking, age verification, and compliant recordkeeping.

☐ Neighborhood and Public Safety:

Exterior lighting, security monitoring of parking areas, and regulated customer access will ensure minimal impact to the surrounding neighborhood and public right-of-way. No outdoor product display, advertising targeting minors, or loitering will be permitted.

☐ Parking and Access:

Existing on-site parking will be utilized. Traffic patterns will not significantly change, and the business will coordinate with local traffic management as needed.

Legend
View

Results



Zoom In



Zoom Out



Pan



Zoom Prev

Zoom Next



Zoom Select



Zoom Extent



Clear



Search



In



4 Items

	PIN	DotPin	Ownname	MailAddr	MailCity
☒	010041500	01.00415.00	MEDIN ROBB	36264 PARK TRL	CENTER CITY
☒	210026600	21.00266.00	SCHMIDT JOSEPH J & CARRIE L KIF	26641 FENWICK AVE	WYOMING
☒	210027500	21.00275.00	DANIELSON KEVIN P	26641 FERIDAY AVE	WYOMING
☒	211106900	21.11069.00	DAMARCO LLC	857 8TH AVE SE	FOREST LAKE

Scale 1: 1000

X: 529360.1774

Y: 100810.7314

RESOLUTION NO. 25-10-106

**RESOLUTION APPROVING AN INTERIM CONDITIONAL USE PERMIT TO
OPERATE A CANNABIS RETAIL STORE
AT
6641 LAKE BOULEVARD**

PROPERTY ID NUMBER 21.11069.00

WHEREAS, the City of Wyoming is a political subdivision, organized and existing under the laws of the State of Minnesota; and,

WHEREAS, the City Council of the City of Wyoming has adopted zoning and subdivision regulations, per Ordinances 2009-4 and 2010-08, including subsequent amendments, to promote the orderly, economic and safe development and utilization of land within the City; and,

WHEREAS, Billy Lavell, representing 10,000 Bakes LLC, has applied for an Interim Conditional Use Permit to operate a cannabis retail store.

The property is legally described as:

Lot 2, Block 1, Palmer Heights

WHEREAS, on October 14, 2025, the Planning Commission held a public hearing in accordance with the Ordinance and laws of the State of Minnesota; and,

WHEREAS, the City Council and Planning Commission have reviewed the application, as submitted, and have made the following findings of fact:

1. The use is in conformity with the Comprehensive Plan and development policies of the City.
2. The use will not create an excessive demand on existing parks, schools, streets and other public facilities and utilities which serve or are proposed to serve the area.

3. The use will be sufficiently compatible or separated by distance or screening from adjacent development or land so that existing development will not be depreciated in value and there will be no deterrence to development of vacant land.
4. The structure and site will have an appearance that will not have an adverse effect upon adjacent properties.
5. The use in the opinion of the City is reasonably related to the overall needs of the City and to the existing land use.
6. The use will be consistent with the purpose of this and other City Ordinances.
7. The use will be located, designed, maintained, and operated to be compatible with the existing or intended character of the zoning district in which it is to be located.
8. The use will generate only minimal vehicular traffic on local streets and shall not create traffic hazards or unsafe access or parking needs.
9. Existing businesses nearby will not be adversely affected because of the curtailment of customer trade brought about by intrusion of noise, glare, or general unsightliness.
10. The establishment or maintenance of the use shall not be detrimental to the public, health, safety, or general welfare.
11. The use will not be hazardous, detrimental, or disturbing to present and potential surrounding land use due to water pollution, odor, fumes, general unsightliness or other nuisances.
12. The use will preserve and incorporate the site's important natural and scenic features into the development design.
13. The use will cause minimal adverse environmental effects.

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Wyoming hereby **APPROVES** the Interim Conditional Use Permit, as requested by the applicant with the following conditions:

1. The applicant shall maintain all site vegetation at the rear of the site along property lines.
2. The applicant shall install the additional 4 parking stalls to come into compliance with Ord. 40-682.
3. The property needs to comply with all applicable local, state and federal regulations necessary for operation of a retail cannabis business including meeting all zoning ordinance requirements.
4. The IUP will terminate upon sale of the property, a change in business ownership or if the applicant does not maintain his license through the Office of Cannabis Management.
5. The applicant shall submit a lighting plan that complies with all standards in ordinance lighting requirements Article VII, Division 15.

6. The applicant shall comply with ordinance lighting requirements including turning off site lighting, except for security lighting one (1) hour after closing.
7. The applicant shall comply with the City Noise Ordinance requirements.
8. If installed, outdoor speakers shall not be located within two hundred (200) feet of any residentially zoned or used property, nor within one hundred (100) feet of any adjacent lot used or zoned non-residential.

ADOPTED BY THE CITY COUNCIL OF THE CITY OF WYOMING THIS 21st DAY OF OCTOBER, 2025.

Lisa Iverson, Mayor

ATTEST:

This Document Drafted by:
The City of Wyoming
26885 Forest Boulevard
Wyoming, Minnesota 55092

Robb Linwood, City Administrator



Request for Council Action

Date: October 16, 2025

Presented to: Mayor Iverson and City Council Members

Presented by: Robb Linwood, City Administrator

Department: Administration

Reference: Storm Water RFP Consultant Selection

Method: New Business

Background Information:

The City of Wyoming issued a Request for Proposals (RFP) for a comprehensive stormwater utility rate study to ensure that stormwater user fees adequately support the City's stormwater management program and compliance with the MS4 (Municipal Separate Storm Sewer System) permit under the Federal Clean Water Act. The study will evaluate the adequacy of existing rates, project future operation and maintenance costs, establish new rates for 2026–2030, and provide long-term reserve and replacement recommendations. Six proposals were received by the October 10, 2025, deadline. All firms met the submission requirements and demonstrated relevant experience in municipal rate studies and financial planning.

Abdo Financial – \$10,750

Abdo's proposal includes a review of the City's current stormwater rate structure, a five-year financial forecast, and recommendations for rate adjustments to ensure the long-term stability of the Surface Water Fund. The scope includes revenue sufficiency testing, reserve evaluation, and capital funding analysis. Deliverables include a financial model, summary report, and presentation to the City Council. Abdo indicated a project timeline of approximately 10 to 12 weeks from notice to proceed. The firm has completed over 50 utility rate studies for Minnesota municipalities, including water, sewer, and stormwater utilities. Abdo currently acts on behalf of the City as its Finance Director, providing financial oversight, budgeting, and reporting services.

Baker Tilly – \$14,500

Baker Tilly's proposal features a cost-of-service analysis to evaluate the City's current rate methodology and develop a model that projects revenue requirements through 2030. The scope includes reviewing fund performance, analyzing customer classifications, assessing capital replacement needs, and recommending equitable rate adjustments. Deliverables include a financial model, written report, and formal presentation of results to the City Council. Baker Tilly has completed over 200 utility rate studies nationwide, including several for Minnesota cities. The firm also serves as the City's Municipal Advisor and provides ongoing guidance on financial planning, debt issuance, and capital improvement funding.

Ehlers – \$10,915

Ehlers' proposal provides a clear, methodical approach to developing an updated stormwater rate structure using industry-standard Equivalent Residential Unit (ERU) and Utility Factor methodologies. The scope includes a review of historical revenue and expenditure trends, identification of projected costs for operation and maintenance, and evaluation of long-term capital needs. Deliverables include a financial model, documentation of rate-setting methodology, and a presentation of findings to the City Council. Ehlers has conducted more than 150 rate studies across Minnesota. The firm's rate models are designed to be easily maintained and updated by City staff in future years.

Erickson Northstar, LLC / WSB – \$10,425

Erickson Northstar partnered with WSB, the City's current engineering consultant. WSB currently assists the City with its MS4 permit and stormwater operations, providing in-depth knowledge of the City's system and regulatory framework. The scope of work includes reviewing the existing rate structure, projecting funding requirements for future capital needs, assessing revenue adequacy, and developing an updated rate model aligned with long-term financial goals. Deliverables include a detailed financial model, written report, and presentation to the City Council. Erickson Northstar has completed more than 30 utility rate studies in the past five years. The firm has also previously completed rate studies for the City of Wyoming, demonstrating a proven track record with the City's financial and operational systems.

Precision Consulting – \$77,975

Precision Consulting's proposal emphasizes advanced analytics and GIS-based financial modeling. The scope includes a parcel-level impervious surface analysis, affordability review, and predictive financial forecasting model. Deliverables include a GIS-integrated rate model, a technical report, and visual dashboards for staff use. The firm has completed projects for regional and national agencies, including large-scale stormwater utilities, but has limited project experience in Minnesota. The cost and scope of this proposal significantly exceed the City's anticipated needs and budget.

Raftelis – \$17,985

Raftelis proposed a structured stormwater rate study that includes a rate structure review, cost-of-service analysis, financial plan, and stakeholder communication framework. Deliverables include a comprehensive rate model, technical report, and presentation to the City Council. Raftelis has completed more than 250 stormwater and utility rate studies nationwide and is widely recognized in the industry for its work on stormwater funding and rate-setting frameworks. The firm's experience includes municipalities of varying size and complexity, with several projects in the Midwest region.

Recommendation: Staff recommends the City Council authorize a professional services agreement with Erickson Northstar, LLC in partnership with WSB in the amount of \$10,425 for completion of the Stormwater Utility Rate Study. Erickson Northstar has successfully completed rate studies for the City in the past and will utilize WSB's insight into the City's MS4 operations to ensure a comprehensive and coordinated approach. They are the low responsible bidder and meet all requirements of the RFP.



SERVICE PROPOSAL FOR

City of Wyoming

26885 Forest Blvd, Wyoming, Minnesota 55092

October 10, 2025

abdosolutions.com | Mankato, MN - Edina, MN - Scottsdale, AZ

Abdo
Financial
Solutions

Proposed by

Victoria Holthaus, CPA, MPA

Partner | Abdo

victoria.holthaus@abdots.com

P 952.715.3069

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Robb Linwood, City Administrator
City of Wyoming
26885 Forest Blvd
Wyoming, Minnesota 55092

Dear Robb,

Thank you for the opportunity to submit this proposal to the City of Wyoming (the City) for partnering with the City on a utility rate study to address the City's need for resources in the Stormwater Fund. Based on our experience with the type of work outlined in the request for proposal, we are confident our experience and expertise will allow us to exceed your expectations. In this proposal, Abdo Financial Solutions, LLC (Abdo FS) will demonstrate to you that we are the best choice for the City as a partner to analyze utility rates. Because we understand your goals, we will also:

- Prepare projections for the years ending December 31, 2026, through 2030 including:
 - Projecting cash flows in the storm water fund
 - Evaluating utility rates for the period of projection
 - Analyzing capital improvement plan needs, and balancing them with available resources
 - Evaluating funding sources and other assumptions provided by Management

Abdo FS acknowledges the City has retained an independent registered municipal advisor (IRMA) to assist and advise the City in evaluating information relating to the issuance of municipal securities and/or municipal financial products. Abdo FS acknowledges the City will rely on advice from their IRMA. Abdo FS will have no recourse against the City or its IRMA, regarding action or inaction relating to evaluating, commenting on, or responding to financial projects or information received under this Agreement. Abdo FS acknowledges it is not the registered independent municipal advisor retained by the Municipal Entity Client.

We look forward to meeting with you to discuss our proposal and appreciate this opportunity to present Abdo FS for your consideration.

Abdo Financial Solutions

Victoria Holthaus, CPA, MPA

Partner | Abdo

The current state

WHAT WE HEARD

We understand the challenges you face as an organization with ever-changing regulations, financial standards, staffing changes, and council vision. Through our conversations, we understand these challenges to include:

- The cost of building and maintaining infrastructure continues to increase. At the same time, the City must balance the need for rate increases along with other economic pressure that rate payers may be experiencing.
- There's a desire and need to provide stability in rates over time. This can be challenging with ever changing costs due to supply chain issues and regulatory changes.
- The City Council and Management need a clear vision for the future, and reassurance that user rates will provide adequate funding so that capital planning decisions may be made with confidence.

CONSIDERATIONS AS YOU MOVE FORWARD

Given these challenges you're facing, we know that it can become overwhelming to grasp all the factors at play. Our team wants to ensure you have a pulse on all of these factors as you begin your search for solutions. Here are the ways our team will support you.

- By developing a five-year projection for operating and capital expenses.
- We will estimate the revenue requirements to adequately support your operating, maintenance, and replacement needs.
- We will provide a clear rate plan for your adoption, through 2030.
- Our team will recommend the appropriate reserve levels, based on the unique needs of your utility.

The path forward

WHAT'S YOUR VISION?

Let's build it together. With knowledge and care, Abdo lights your path forward—illuminating opportunity and fueling your confidence to navigate the future. What do you envision for your future? We believe it could look something like this:

- A thorough understanding of your utility's operating and capital funding needs through review of your financials, and communication with Management.
- A rate plan that will guide the Council's decision making process, and ensure adequate rates are in place to fund the utility through 2030.

EXPERTISE FOR YOUR CHALLENGES

In the government space, your organization faces unique challenges that require a specific understanding of government regulations and operations. Our team not only has experience working with governmental entities, but many came directly from city administration and finance offices, giving them a unique understanding of the challenges you face.



Meet Jessi

Jessi Sturtz
Senior Manager

Jessi has over ten years of experience working with local governments in accounting and finance, as well as ten years of experience in the banking industry. She has over 10 years of experience working with Banyon, and 3 years working with BS&A.



The Abdo Difference

At Abdo, we believe in the importance of relationships. This core value is the foundation of our approach to delivering the best experience and outcomes for our clients. It's inherent in our people and the way we work.

We know that for our clients to be successful, it takes more than having experience and credentials – we take the time to listen to their unique motivations, goals, and challenges. We truly care about their journey and where their path leads.

[LEARN MORE ON OUR WEBSITE](#)

Your Team

At Abdo, we believe that trust is a vital component in the success of our partnership. That trust requires an understanding of your needs and confidence in the expertise of your engagement team. That's why we've curated a team with relevant experience and first-hand knowledge of the challenges you face. Many of our advisors have worked in government finance offices for decades, cultivating the same experiences you currently face. This depth of understanding can lead to a comprehensive view of your challenges, potential cost reductions, and a quicker road to results.

KEY CONTACTS

Key team members are briefly profiled below, with additional staff providing support as needed throughout the engagement.



VICTORIA HOLTHAUS, CPA, MPA

Partner

victoria.holthaus@abdofs.com

P 952.715.3069

With over 20 years of experience in government finance and administration, Vicki understands the complexities of government finance. During this engagement, she'll oversee the team's progress, provide strategic direction for the project, and lend her expertise to ensure your vision of the future is bright on the path ahead.



JULIE MCMACKINS

Senior Manager

julie.mcmackins@abdofs.com

P 952.715.3062

With over 15 years of experience working with Minnesota municipalities and two years experience in the private sector, Julie currently works with clients in a variety of financial roles such as budgeting, annual and quarterly financial reporting, utility rate studies, long-term planning, and audit preparation.



JESSI STURTZ

Manager

jessi.sturtz@abdofs.com

P 507.304.6888

Jessi has over ten years of experience working with local governments in accounting and finance, as well as ten years of experience in the banking industry. She has over 10 years of experience working with Banyon, and 3 years working with BS&A.



IZZY WILFAHRT

Associate

izzy.wilfahrt@abdofs.com

P 952.395.9334

Izzy joined the firm in 2022 and has experience in bank reconciliations, accounts payable, cash receipting, utility billing and quarterly reporting. During this engagement, she'll support the city's processes and lend her expertise to ensure your vision of the future is bright on the path ahead.



Government Experience

You can have confidence in our years of experience performing consulting services, the quality of the accounting services we offer and our understanding of the unique challenges our clients face in the government space. Since 1963, we've served cities just like yours. With an unwavering commitment to streamlining processes, training staff, and finding technology-based solutions, we proudly offer excellence in governmental consulting and auditing. Out of our 250-strong, talented staff, over 70 team members are 100% focused on government clients, which include over 100 cities and other governmental entities. By serving cities across Minnesota, we have become experts in the nuances of how to best support your city. Our expertise affords you a consulting experience that is painless. We do this by communicating up front, coming fully prepared, and being available throughout the year to support you.

PROCESS

Our methods are centered around incorporating technology to deliver unparalleled solutions for government organizations. In addition to our consulting experience, our firm expertly performs outsourcing for governments giving us a wealth of experience in a consulting role. We don't believe in a one-size-fits-all mentality. So together, we'll focus on the needs that are relevant to your city and provide the right services to meet them with a customized methodology based on your needs. We're focused on developing creative, customized solutions to help your city mitigate costs and boost efficiency.

FOCUS

Through continuous training and growth opportunities, we've established an environment with a focus on serving government entities. We spend more than 100 hours training and onboarding to ensure success for our clients. We truly hope that you partner with us to light the path forward for your organization.

OUR QUALIFICATIONS

- GFOA and MnGFOA Association members
- Government operations training
- Consulting services for over 100 cities
- We've assisted many municipalities in preparing for the GFOA's Certificate of Achievement for Excellence awards in financial reporting

OUR FINANCIAL MANAGEMENT AND CONSULTING SERVICES INCLUDE:

- Budget process development
- Capital improvement planning
- Cash flow analysis
- Cost containment processes
- Debt management plans
- ERP system consulting
- Federal and State relations/grant consulting
- Finance Director services
- Financial management plans
- Financial reporting and analysis
- Fleet: Operations and replacement rate analysis
- Interim accounting and financial services
- Internal control evaluation
- Long-term strategic planning
- Payroll processing
- Policy development
- Process flows and efficiencies
- Project management
- Quarterly and monthly reporting to management
- Reconciliations
- Software implementation
- Training
- Utility/fee analysis
- Year-end audit preparation and financial statement preparation



Project Approach

PROJECT APPROACH

The following information outlines the approach we will take for the project.

INITIAL ASSESSMENT

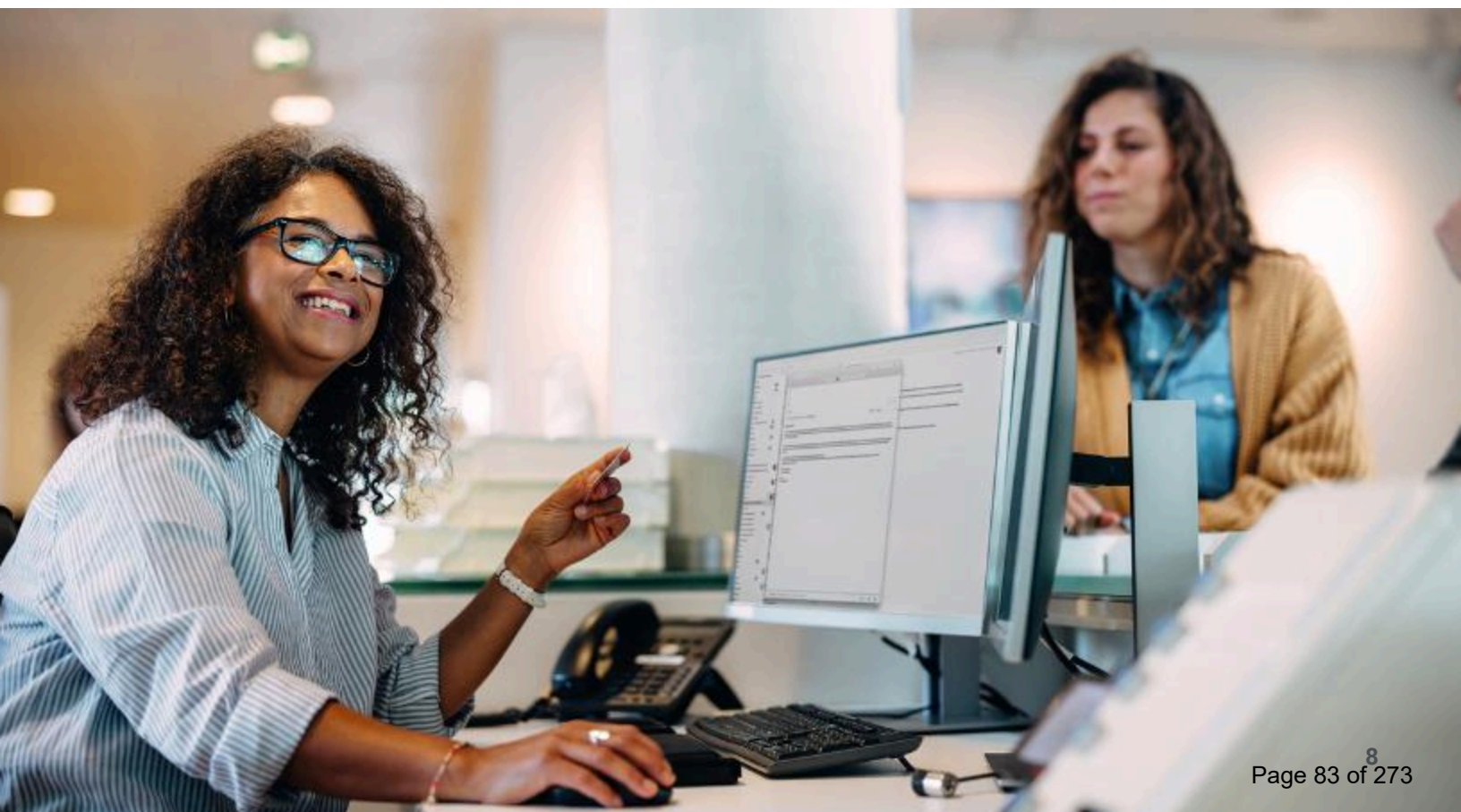
The first step to this project is to review and analyze data provided by the City. After this review, Abdo FS will meet with the city team to discuss overall anticipated project expectations, outcomes and timelines.

UTILITY RATE STUDY PROCESS

- Gather input from city management
- Evaluate Stormwater operational and infrastructure expenditures – both current and projected
- Determine the impact of future bond issues on users of system
- Develop projection of future operational and infrastructure costs
- Provide projection based on existing rate structure based on existing debt and future projects
- Review and discuss outcomes with city management and City Council



[SEE A SAMPLE UTILITY RATE STUDY REPORT](#)



CITY EXPECTATIONS

The engagement to be performed is conducted on the basis that you acknowledge and understand that our role is to prepare the projection in accordance with guidelines for the presentation of a projection established by the AICPA. You have the following overall responsibilities that are fundamental to our undertaking the engagement to prepare your projection in accordance with SSAR

- The selection of accounting principles to be applied in the preparation of the projection.
- The design, implementation, and maintenance of internal control relevant to the preparation and presentation of the projection that is free from material misstatement, whether due to fraud or error.
- The prevention and detection of fraud.
- To ensure that the City complies with the laws and regulations applicable to its activities.
- The accuracy and completeness of the records, documents, explanations, and other information, including significant judgments, you provide to us for the engagement to prepare the projection. Devote uninterrupted time to working with us as needed.
- Make candid representations about your plans and expectations.
- Make all management decisions and perform all management functions.
- Provide an individual responsible to review and accept our work.
- To provide us with:
 - Documentation and other related information that is relevant to the preparation and presentation of the projection,
 - Additional information that may be requested for the purpose of the preparation of the projection, and
 - Unrestricted access to persons within the City with whom we determine it necessary to communicate.

The projection will be accompanied by a report. However, you agree that the projection will clearly indicate that no assurance is provided on it.

Project Timeline

TASK	RESPONSIBLE STAFF	DATE
Kick-off meeting	Abdo and City Administrator	Week of October 23, 2025
Document request submitted to the City	City Administrator	October 23, 2025
Document request due from the City	City Administrator	October 27, 2025
Meeting to review utility rate analysis	Abdo and City Administrator	Week of November 3, 2025
Final utility rate analysis released to City	Abdo	November 12, 2025
Attend Council meeting to present utility rate analysis	Abdo	November 18, 2025

Value

We at Abdo FS help cities achieve their financial goals.

Fees are based on the assumption and limitations outlined in the Project Approach. Below are the fees for our services.

SERVICE	FIXED FEE*
Utility Rate Study	\$10,750

Payment Schedule:

Contract Execution	50% of contracted amount
Project Completion	Remaining balance

** This fixed fee agreement entitles the City to utility rate scenarios based on a set of assumptions. At the request of the City, Abdo Financial Solutions may run alternative utility rate scenarios. Each additional scenario will be provided at a cost of \$3,500.*

This quote is valid for thirty (30) days.

Initial invoice will be sent within 10 days of the execution of this agreement.

In an effort to reduce environmental impact, you will receive printable, downloadable PDFs of your report. To receive one (1) paper report, you will be charged \$150 for a set-up fee. Additional paper copies will be charged at the rate of \$50 per report.

The stated fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the engagement. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs.

You agree to hold us harmless and to release, indemnify, and defend us from any liability or costs, including attorney's fees, resulting from management's knowing misrepresentations to us.

Technology



We believe technology should enhance our service offerings, making our work less intrusive, our time with you more productive and everyone's data more secure. The use of technology in our financial accounting and consulting services enables us to streamline our processes and helps to automate certain functions of our work so we are able to spend more time analyzing our results and working directly with you.

Through the outbreak of COVID-19, our team has been able to seamlessly move to a completely remote work environment with no loss of productivity, cooperation, or communication. Since March 17, 2020, our staff has been successfully conducting remote financial accounting and consulting services using the latest video conferencing and secure file sharing technology. Through Zoom, Microsoft Teams, or whatever technology your city may use, our team will continue to work through normal procedures, including regular meetings with you during the engagement to ensure effective collaboration with your team.

We take the security of our client's data - and our own - very seriously. A number of systems are in place to ensure the safety of your city's data. We operate on a remote distributed infrastructure leveraging Microsoft's Cloud Platform Azure. This not only allows our staff to securely work from any computer, anywhere, any time, but also provides large-scale, cutting-edge technology and security for your data. Your data is housed in secure data centers that reside exclusively in the U.S. and not on laptops or local servers which could be stolen or misplaced. We continually provide security awareness training to our staff members to ensure they are good digital stewards of your data. In addition to this, we also consult bi annually with 3rd party security experts to conduct risk assessments and conduct annual penetration tests.

IT ALSO MEANS:



All firm staff use dual authentication to ensure that every login to our remote environment is secure and authorized.



All data is saved on redundant servers and data centers so if one server fails, another immediately takes over with no data lost.



All data is backed up continually which means we always have an extra copy for safe-keeping.



All incoming emails, attachments, and embedded links are scanned for viruses prior to landing in our inbox, which allows us to operate with more protection from phishing emails, malware attacks, and other digital threats.

Our cloud platform, Azure, is globally trusted by companies and governments and has numerous security compliance standard they adhere to. Reports of these can be provided as requested.

What Our Clients Say

CLIENT REFERENCES

One of the things we enjoy most about our work is developing long-term relationships with our clients and watching their city thrive as we help them to evolve and grow. Our clients listed below serve as a sample of references of those we partner with for their financial accounting and consulting services. Additional references are available upon request.



CITY OF OAK GROVE

Loren Wickham
City Administrator
P 763.404.7075

SERVICES PROVIDED

Outsourced Finance
Director
Budgeting
Audit Preparation
HR Consulting
Utility Rate Study

CITY OF DUNDAS

Jenelle Teppen
City Administrator
P 507.645.2852

SERVICES PROVIDED

Long-term Plan
Outsourced Finance
Director
Budgeting
Audit Preparation
Utility Rate Study

CITY OF CRYSTAL

Kim Therres
Assistant City Manager
P 763.531.1132

SERVICES PROVIDED

Long-term Plan
Outsourced Finance
Director
Process Evaluation
(ProEval)
Utility Rate Study
Budgeting
Audit Preparation
Utility Billing
Payroll Processing

Value-Added Services

When you partner with Abdo, you get access to our entire catalog of services. Below is a selection of the additional solutions that we believe could be of great value to your city. If you have need of these services, please reach out to us so we can help! Our additional service offerings can be found at www.abdosolutions.com.

HR & PAYROLL SERVICES

We help employers better support their most valuable resource...their people. Having clear and consistent HR practices that best suit the individuality of your city is key, even more so in today's tight employment environment. And because the right policies are just as important, we lend our HR expertise to help you strategically plan for your future.

We help cities with:

- Employee management and development
- Regulatory compliance
- Benefits analysis and administration, including the Affordable Care Act (ACA) and workers' compensation
- HR/Payroll software implementation and management
- Advisory services such as specialized labor cost analysis, compensation studies, and HR process development and implementation

TECHNOLOGY & DATA SOLUTIONS

Empowering you with advanced data analytics & insights. Data is one of your city's most powerful assets. Using it to your advantage, however, can be a challenge. Our technology and data solutions are designed to give you the information you need - how, when, and where you need it. Our consultants leverage a powerful mix of technology and tools to support you with the data analytics and insights you need. From creating user-friendly dashboards and reports to managing software implementations, we deliver solutions that work for you.

We can help your city with:

- Strategic data analytics
- Software solutions: evaluation, selection & implementation
- Financial reporting solutions
- Automation solutions

Why Partner with Abdo

LIGHTING THE PATH FORWARD

In a world of ever-changing complexity, people need caring, empathetic and highly skilled professionals they can depend on to provide the right advice and solutions for them. Our clients seek growth and success, but also want security and confidence. For nearly 60 years, Abdo has provided insights for our clients to help them achieve their goals.

That same innovative spirit is also what has earned us the title of being one of the top accounting firms in the Midwest. Abdo is a better firm today because of the efforts we made to support a culture driven by our core values of growth, relationships, and teamwork.

With this foundation in place, we have successfully helped our clients identify and break through their own growth barriers. Every challenge they face is an opportunity for us to listen, understand and empower them with solutions and a plan to achieve their goals. It's fulfilling to serve as the catalyst that helps them overcome obstacles that block their progress.

When it comes to our working relationships, we are partners. We're confidants. We're the catalyst that sparks true business growth, providing guidance through every challenge and opportunity along the way.

ABOUT ABDO

Abdo is a full-service accounting and consulting firm that delivers customized strategies and innovative solutions to help businesses, governments and nonprofits succeed. With more than 180 professionals and nearly six decades of experience, Abdo is ranked as one of the top accounting firms in the Midwest. It is a licensed CPA firm with offices located in Minneapolis and Mankato, Minnesota, and Scottsdale, AZ. Abdo's commitment to its clients is to gain in-depth knowledge of their unique challenges, opportunities, and needs. Through this consultative approach, Abdo partners with organization leaders to light the path forward to confidently reach their goals.

"Listening to our clients' needs, understanding their challenges, and adjusting how we work together is key to our partnership with the people we serve."

-- **Steve McDonald, CPA** | *Managing Partner*



Appendix A

AGREEMENT FOR FINANCIAL
SERVICES

Agreement for Financial Services

THIS AGREEMENT, is made and entered into on October 10, 2025 by and between the City of Wyoming, Minnesota (hereinafter referred to as the "Client"), and Abdo Financial Solutions (hereinafter referred to as the "Contractor").

Articles of Agreement & Recitals

WHEREAS, the Client is authorized and empowered to secure from time to time certain professional services through contracts with qualified consultants; and

WHEREAS, the Contractor understands and agrees that:

1. The Contractor will act as an Independent Contractor in the performance of all duties under this Agreement. Accordingly, the Contractor shall be responsible for payment of all taxes, including federal, state and local taxes and professional/business license fees arising out of the Contractor's activities;
2. The Contractor shall have no authority to bind the Client for the performance of any services or to obligate the Client. The Contractor is not an agent, servant, or employee of the Client and shall not make any such representations or hold himself/herself out as such;
3. The Contractor shall be the exclusive outsourced accounting service provider for the Client during the term of this Agreement;
4. The Contractor shall perform all professional services in a competent and professional manner, acting in the best interests of the Client at all times.
5. The Contractor shall not accrue any continuing contract rights for the services performed under this Agreement.

NOW THEREFORE, in consideration of the mutual covenants and promises contained herein, it is agreed as follows:

ARTICLE I

INCORPORATION OF RECITALS

The recitals and agreement set forth above are hereby incorporated into this Agreement.

ARTICLE II

LIABILITY INSURANCE

Section 1 Liability Insurance: The Contractor shall obtain professional liability insurance, at their expense with liability insurance coverage minimums in the amount of \$2,000,000, which Contractor must secure and maintain during the term of this Agreement. Contractor will provide Client with proof of liability insurance coverage under this Agreement in writing upon request by the Client.

ARTICLE III

DURATION OF THE AGREEMENT

Section 1 Duration: This Agreement shall commence upon date of execution by all parties and will remain in effect until December 31, 2025 unless earlier terminated as provided in Sections 2 and 3.

Section 2 Client's Termination Rights: The Client may terminate this Agreement upon sixty (60) days written notice in the event the Client determines in its sole discretion that it is not in the Client's best interest to continue using Contractor's services. The Client may terminate on ten (10) days written notice if the Contractor fails to perform its obligations under this Agreement.

Section 3 Contractor's Termination Rights: Contractor may terminate this Agreement upon thirty (30) days written notice to Client in the event Client does not pay Contractor compensation as required under Article 5, Section 9 within fifteen (15) days after invoice is received by Client. In the event of non-payment within thirty (30) days, Contractor shall give the Client an opportunity to cure the default by giving a notice of such non-payment and an additional five (5) days after the Client's receipt of the notice to remit such payment, prior to giving a notice of termination. Contractor can also terminate the Agreement with sixty (60) days written notice if the Contractor believes it is in its best interests to terminate the Agreement.

ARTICLE IV

GENERAL

Section 1 Authorized Client Agent: The Client's authorized agent for the purpose of administration of this Agreement is the City Administrator. Said agent shall have final authority for approval and acceptance of the Contractor's services performed under this Agreement and shall further have responsibility for administration of the terms and conditions of this Agreement. All notices under this Agreement shall be sent to the person and address indicated below on the signature lines.

Section 2 Amendments: No amendments or variations of the terms and conditions of this Agreement shall be valid unless in writing and signed by the parties.

Section 3 Assignability: The Contractor's rights and obligations under this Agreement are not assignable or transferable.

Section 4 Data: Any data or materials, including, but not limited to, reports, studies, photographs, negatives, or any and all other documents prepared by the Contractor or its outside consultants in the performance of the Contractor's obligations under this Agreement shall be the exclusive property of the Client, and any such data and materials shall be remitted to the Client by the Contractor upon completion, expiration, or termination of this Agreement. Further, any such data and materials shall be treated and maintained by the Contractor and its outside consultants in accordance with applicable federal, state and local laws. Further, Contractor will have access to data collected or maintained by the Client to the extent necessary to perform Contractor's obligations under this Agreement. Contractor agrees to maintain all data obtained from the Client in the same manner as the Client is required under the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13 or other applicable law (hereinafter referred to as the "Act"). Contractor will not release or disclose the contents of data classified as not public to any person except at the written direction of the Client. Upon receipt of a request to obtain and/or review data as defined in the Act, Contractor will immediately notify the Client. The Client shall provide written direction to Contractor regarding the request within a reasonable time, not to exceed fifteen (15) days. The Client agrees to indemnify, hold harmless and defend Contractor for any liability, expense, cost, damages, claim, and action, including attorneys' fees, arising out of or related to Contractor's complying with the Client's direction. Subject to the aforementioned, Contractor agrees to defend and indemnify the Client from any claim, liability, damage or loss asserted against the Client as a result of Contractor's failure to comply with the requirements of the Act. Upon termination and/or completion of this Agreement, Contractor agrees to return all data to the Client, as requested by the Client.

ARTICLE IV - CONTINUED

GENERAL (CONTINUED)

Section 5 Entire Agreement: This Agreement is the entire agreement between the Client and the Contractor, and it supersedes all prior written or oral agreements. There are no other covenants, promises, undertakings, or understandings outside of this Agreement other than those specifically set forth. Any term, condition, prior course of dealing, course of performance, usage of trade, understanding, or agreement purporting to modify, vary, supplement, or explain any provision of this Agreement is null and void and of no effect unless in writing and signed by representatives of both parties authorized to amend this Agreement.

Section 6 Severability: All terms and covenants contained in this Agreement are severable. In the event any provision of this Agreement shall be held invalid by any court of competent jurisdiction, this Agreement shall be interpreted as if such invalid terms or covenants were not contained herein, and such holding shall not invalidate or render unenforceable any other provision hereof.

Section 7 Contractor Fiscal Decision Waiver: Contractor is responsible for providing the Client with timely and accurate financial recommendations and information that allows the Council the ability to make final financial decisions. Contractor will provide final financial recommendations but is not responsible for the final decisions made regarding financial matters.

Section 8 Compensation: The parties agree that the Contractor shall be paid compensation for the services provided hereunder, payable for work performed in accordance with this Agreement, based on the fees indicated on the Value page of this proposal. Additional fees will not be incurred without prior approval of the Client.

Initial invoice for anticipated first month fees will be sent within 10 days of the execution of this agreement. Monthly installment fees will be invoiced throughout the remainder of this Agreement. If the Agreement is for an hourly fee basis, invoices will be sent monthly.

Section 9 Additional Services: Should the Client request additional services in addition to the Contracted Services, the Contractor will provide the Client with proposed fees for the services to be provided. The Client shall provide a written or electronic confirmation prior to the proposed services implementation.

Section 10 Outside Contractors: It shall be the responsibility of Contractor to compensate any other outside consultants retained or hired by Contractor to fulfill their obligations under this Agreement and shall be responsible for their work and Contractor, by using outside contractors, shall not be relieved of its obligations under this Agreement.

Section 11 Municipal Advisor: Abdo FS acknowledges the Client may/has retained an independent registered municipal advisor (IRMA) to assist and advise the Client in evaluating information relating to the issuance of municipal securities and/or municipal financial products. Abdo FS acknowledges the Client will rely on advice from their IRMA. Abdo FS will have no recourse against the Client or its IRMA, regarding action or inaction relating to evaluating, commenting on, or responding to financial projects or information received under this Agreement. Abdo FS acknowledges it is not the registered independent municipal advisor retained by the Municipal Entity Client.

Section 12 Equal Employment Opportunity: Abdo, LLP and its subsidiary companies are committed to providing equal employment opportunities to all employees and applicants for employment without regard to any legally-recognized basis "protected class" including but not limited to: veteran status, uniform service member status, race, color, religion, sex, national origin, age, physical or mental disability, sexual orientation or marital preference, genetic information or any other protected class under federal, state, or local law.



Appendix B

AGREEMENT FOR THE PROVISION OF
PROFESSIONAL SERVICES

Agreement for the Provision of Professional Services

WHEREFORE, this Agreement was entered into on the date set forth below and the undersigned, by execution hereof, represent that they are authorized to enter into this Agreement on behalf of the respective parties and state that this Agreement has been read by them and that the undersigned understand and fully agree to each, all and every provision hereof, and hereby, acknowledge receipt of a copy hereof.

City of Wyoming

26885 Forest Blvd

Wyoming, Minnesota 55092



SIGNATURE

Robb Linwood

Abdo Financial Solutions, LLC

5201 Eden Avenue, Suite 250

Edina, Minnesota 55436

A handwritten signature in black ink, appearing to read "Victoria Holthaus".

Victoria Holthaus, CPA, MPA

Partner | Abdo

October 10, 2025



Appendix C

PROFESSIONAL BIOGRAPHIES



Victoria Holthaus

CPA, MPA

Partner | Abdo Financial Solutions

victoria.holthaus@abdofs.com

P 952.715.3069

Vicki aims to simplify the complex for her clients. Her goal is to give them a solid understanding of their finances, so they can confidently plan ahead. She specializes in working with local governments and nonprofit agencies to strategize capital improvements, develop strategic long-range financial plans, and troubleshoot accounting and financial challenges. She also provides process evaluation and process improvement services for nonprofit and private sector clients. Over the past several years, Vicki has helped many organizations with strategic upgrades to technology and software as they navigate new ways of interacting with donors, constituents, and customers. Along with the ability to creatively explain technical terms, Vicki has firsthand knowledge of the issues governments and non-governmental organizations face.

EDUCATION

- Bachelor of Science in Accounting, National American University
- Master of Arts in Public Administration, Hamline University
- Continuing professional education

PROFESSIONAL MEMBERSHIPS

- Minnesota and Arizona Society of Certified Public Accountants
- American Institute of Certified Public Accountants
- Minnesota Council of Non-Profits
- Government Finance Officer's Association of the United States and Canada, Minnesota, Arizona, and Arkansas Government Finance Officer's Association
- Minnesota and Arizona Government Finance Officers Association

AFFILIATIONS

- Hamline School of Business, Accounting Board Member
- Arizona Women Leading Government Member

QUALIFICATIONS

- 17 years of experience working with local governments and nonprofits in finance and administration
- Experience with budgeting, capital planning, debt management, as well as being the process evaluation and improvement engagement lead and non-profit advisory service leader
- Previous speaker at MCFOA Municipal Clerks and Finance Officers Association, League of Minnesota Cities and has developed newsletter content on fraud prevention, automation, long-term planning and process improvements



Julie McMackins

Senior Manager | Abdo Financial Solutions

julie.mcmackins@abdofs.com

P 952.715.3062

Julie joined the Firm in 2021 as a Manager in the Financial Solutions department. Prior to joining Abdo FS, she spent nine years working for the City of Plymouth in Accounting roles, including Accountant, Supervising Accountant and Interim Finance Manager. In these roles, Julie was involved in a wide variety of finance responsibilities. Julie also has four years of experience in accounting and auditing roles. She currently works with clients in a variety of financial roles such as budgeting, annual and quarterly financial reporting, utility rate studies, long-term planning, and audit preparation.

EDUCATION

- Bachelor of Science in Accounting, Winona State University
 - *Graduated Summa Cum Laude*
- Certified Public Accountant (Inactive)
- Continuing professional education

PROFESSIONAL MEMBERSHIPS

- Minnesota Government Finance Officers Association
- National Government Finance Officers Association

QUALIFICATIONS

- 15 years of experience working with Minnesota municipalities and two years experience in the private sector
- Experience in a variety of roles within local government, including, but not limited to: preparation of 10-year financial plan, monitoring cash and investment balances, preparation of biennial budget, audit preparation, preparation of City's annual financial report, led capital improvement plan processes, preparation of utility rate studies and cash flow analyses, preparation and submission of financial information for external reporting agencies
- Experience in analyzing processes and providing recommendations to increase efficiency, accuracy and transparency
- Experience in supervising and leading staff in the finance division in performing accounts payable, billing, cash receipts, payroll and general ledger accounting
- Experience in implementation of financial software, billing and payment options for utility billing, as well as acted as a liaison between staff and the Information Technology division
- Experience training on Fund Accounting and Budget Preparation with the MN Clerks Institute



Karri Thorsten

Manager | Abdo Financial Solutions

karri.thorsten@abdofs.com

P 952.939.3214

Karri joined the Firm in 2022 with the Financial Solutions department. She has over 25 years of finance experience in governments and nonprofit organizations. Most recently Karri was the Director of Finance and Operations for the Foley Public Schools, monitoring budgets, revenues, managing day-to-day operations, completing monthly and quarterly accounting procedures, and working closely with financial policies and accounting procedures according to GAAP. Karri also served as the Benton County Auditor-Treasurer for 6 years.

EDUCATION

- Bachelor of Science in Accounting, St. Cloud State University

PROFESSIONAL MEMBERSHIPS

- LEAN Certification, Minnesota Association of Counties

QUALIFICATIONS

- 25+ years of finance experience with governments and nonprofit organizations
- 6 years of experience as a Auditor-Treasurer for a County in Minnesota
- Experience monitoring budgets, revenues and expenditure trends
- Experience with calculations collections and disbursements of taxes
- Experience in managing a finance department, and ensuring accurate and timely completion of finance tasks
- Extensive knowledge of compliance in financial policies and accounting procedures according to GAAP



Jessi Sturtz

Manager | Abdo Financial Solutions
jessi.sturtz@abdofs.com
P 507.304.6888

Jessi joined the Firm in 2020 in the Financial Solutions group. Prior to joining Abdo FS, Jessi worked for a local government in southern Minnesota. She has over ten years of experience working with local governments in accounting, as well as ten years of experience in the bank industry. She has over 10 years of experience working with Banyon, and 3 years working with BS&A. She currently works with clients ranging from 1,000 - 25,000 in population in a variety of different financial roles such as budgeting, audit preparation, monthly cash reconciliation, processing accounts payable, and quarterly financial reporting. In the past year, she has gained county experience in the auditor/treasurer department. In addition, Jessi has co-presented at the Municipal Clerks and Finance Officers of Minnesota Institute on Fund Accounting and Budgeting, and co-presented at the Minnesota Association of School Business Officials on Unclaimed Property.

EDUCATION

- Bachelor's Degree in Accounting, Rasmussen College
- Continuing professional education

PROFESSIONAL MEMBERSHIPS

- Minnesota Certified Municipal Clerk

QUALIFICATIONS

- 10+ years of experience working with local governments
- 15 years of experience working at a financial institute in accounting
- Background with budgeting, transactional processes, utility billing and payroll
- Experience processing quarterly/yearly payroll reports (941 Federal Tax Return, MN Department of Revenue, Unemployment Report, W-2, 1099's and 1095's)
- Works extensively with Microsoft Office, Banyon, Tyler Incode and BS&A
- Experience presenting budgets and quarterly reports to City Council
- Experience training new staff in various roles for cities, including, but not limited to: payroll, accounts payable, cash and investment reconciliation, and budgeting



Izzy Wilfahrt

Associate | Abdo Financial Solutions
 izzy.wilfahrt@abdofs.com
 P 952.395.9334

Izzy joined the Firm as an Associate in the Financial Solutions department in 2022. Prior to joining Abdo, Izzy spent a year and a half as a Member Service Representative for Northern Communities Credit Union. While at Northern Communities, she received her first and second MSR certifications. She has a wealth of knowledge and experience in financial software and performing 100+ customer transactions per day. She also worked as a student researcher at St. Scholastica, working directly with area chambers of commerce collecting, compiling, and analyzing survey data. Izzy is passionate about financial education and is currently pursuing her CPA licensure.

EDUCATION

- Bachelor of Arts in Accounting, The College of Saint Scholastica
 - *Minor in Music*
 - *Graduated Magna Cum Laude*
 - *Webster Scholar*
 - *Dean's List*
 - *Awarded "Outstanding Senior in Accounting" at the College of Saint Scholastica*
- Currently pursuing CPA licensure

PROFESSIONAL MEMBERSHIPS

- Minnesota Society of Certified Public Accountants

QUALIFICATIONS

- Greater than one year of experience in the banking industry as a Member Service Representative (MSR) with first and second MSR certifications
- Prior experience in banking data entry, analytics & presentation
- Experience in bank reconciliations, accounts payable, cash receipting, utility billing and quarterly reporting
- Software competencies in Microsoft Office, QuickBooks, Banyon, and a variety of other accounting softwares



October 10, 2025

City of Wyoming, MN



Proposal for a stormwater utility rate study

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As of June 3, 2025, Baker Tilly and Moss Adams have merged. Combined statistics are based on data currently available. Actual counts may vary slightly and will be finalized during the integration process.

A. Letter of Transmittal

Robb Linwood, City Administrator
City of Wyoming
P.O. Box 188
26885 Forest Blvd
Wyoming, Minnesota 55092
Delivered electronically

Baker Tilly Advisory Group, LP
225 S Sixth St
Suite 2300
Minneapolis, MN 55402
+1 (612) 876
4500bakertilly.com

Dear Mr. Linwood and Members of the City Council:

Baker Tilly is pleased to submit our proposal to conduct a comprehensive stormwater utility rate study for the City of Wyoming (the City). We recognize the City's dedication to implementing equitable, sustainable, and progressive stormwater rates across all customer categories, including residential, commercial, industrial, and institutional sectors. This proposal is the starting point — our vision of how we can achieve your goals to:

To ensure the City of Wyoming receives a thorough and actionable rate study, Baker Tilly will deliver a comprehensive suite of analyses and recommendations. Our approach addresses each key requirement outlined by the City, as detailed in the following tasks:

- Develop a five-year projection of stormwater utility costs and revenue requirements.
- Establish rates that are fair, equitable, and sufficient to fund ongoing operations, maintenance, capital improvements, and regulatory compliance.
- Provide scenario analysis for various rate structures and future needs.
- Deliver a transparent, data-driven final report and recommendations to support City decision making.

Baker Tilly brings unmatched expertise and a proven track record in utility rate studies for municipalities across Minnesota and the nation. We are a nationally recognized leader in utility rate studies, with more than 50 years of experience supporting communities in analyzing utility costs, designing equitable rates, and planning for long-term financial sustainability. Our dedicated utilities team—comprised of over 300 professionals—has worked with more than 2,500 utility clients across the United States.

Our firm brings a unique combination of strengths that make us the ideal partner for this engagement:

DEEP UTILITY EXPERTISE

Our team has experience conducting rate studies for municipalities, with a strong understanding of cost-of-service analysis and rate modeling.

TAILORED, TRANSPARENT APPROACH

We prioritize stakeholder engagement and transparency, ensuring that our recommendations are data-driven, legally sound, and aligned with community values.

C. CONSULTANT QUALIFICATIONS / PROFILE

PROVEN TRACK RECORD

Baker Tilly has successfully completed similar projects for cities with complex water, wastewater and stormwater systems, demonstrating our ability to deliver actionable insights and facilitate informed decision-making.

SHARED HISTORY

Baker Tilly has a long history with the City and for at least the last 15 years has provided municipal advisory for bond financings, consulting services for utility rate and compensation studies just to name a few services. We believe having familiarity with the City is paramount to our ability to understand and deliver impactful results for the City.

Our key personnel for this engagement each brings specialized expertise in financial modeling, rate design, and public utility consulting. Baker Tilly will not be utilizing any subconsultants for this engagement. All services will be provided exclusively by Baker Tilly professionals.

AUTHORIZED OFFICER

Andre Riley, Principal
9229 Delegates Row
Indianapolis, IN 46240
+1 (317) 465 1537 | Andre.Riley@bakertilly.com

We are enthusiastic about the opportunity to work with the City and contribute to the long-term sustainability of its stormwater system. Should you have any questions or require additional information, please contact me directly at:

We can't wait to get started.

Sincerely,



Andre Riley, Principal
+1 (317) 465 1537 | andre.riley@bakertilly.com

C. Consultant qualifications / profile

Include qualifications of the firm as it relates to preparing stormwater rate analysis, including previous experience with similar projects for cities or other units of government.

Related Experience

Baker Tilly has extensive experience working with utilities throughout the country to develop rate models to support on-going operations and fund critical infrastructure improvements and upgrades. These models focus on providing easily understandable outputs that allow decision makers to implement actionable plans that will support the future operations of their utilities. Baker Tilly created stormwater rate models for St. Paul, Minnesota, East Chicago, Indiana and Porter County, Indiana. Below is a brief description of the work that has been provided by Baker Tilly to these communities.

St. Paul, Minnesota - The City of St. Paul (the “City”) addresses stormwater management under the sewer utility division. Baker Tilly has been working with the City to develop and analyze stormwater and sewer rates designed to support the on-going operations of the City. The sewer and stormwater model includes a ten-year analysis of estimated future operations and necessary capital investment in the City’s sewer and stormwater systems. Due to the magnitude of the on-going improvements, Baker Tilly also assist the City with financings needed to support the City’s capital improvement program.

Andre Riley served as the engagement principal and Mitchell Eschweiler served as the project manager

East Chicago, Indiana – The City of East Chicago (the “City”), located in northwest Indiana, operates a department focused on stormwater quality management. Baker Tilly has been working with the City since 2012 to develop and analyze stormwater rates designed to support the on-going operations of the City. The City has a customer base which includes residential, commercial and large significant industrial customers. The stormwater rates were designed to fairly recover the revenues from those customers who impact the stormwater system the most. The stormwater model for the City includes analysis of the on-going operations, significant capital improvements and development of stormwater user fees designed to recover revenues based on customer equivalent runoff units.

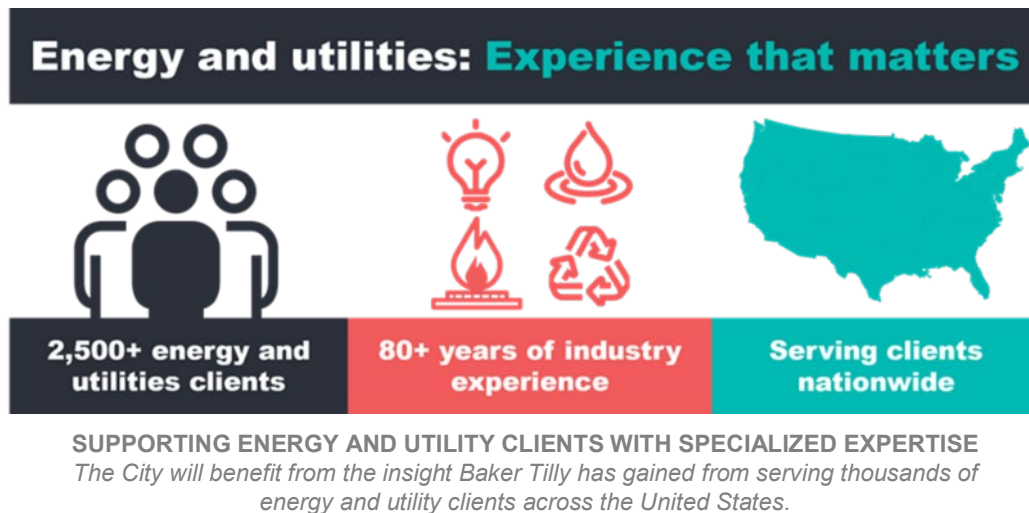
Andre Riley served as the engagement principal and Mitchell Eschweiler served as the project manager

Porter County, Indiana – Porter County, located in northwest Indiana, operates a Department of Development and Stormwater Management for unincorporated portions of the county. Baker Tilly assisted in the establishment of the district and the development of the initial stormwater rates. The stormwater rates were designed to recover revenues necessary to fund operations while also accomplishing on-going capital investment in the system to improve water quality, reduce flood damages and restore and enhance the natural drainage system. The stormwater rates were developed to be fair, equitable, transparent and dependable for all users of the system.’

Andre Riley served as the project manager and Mitchell Eschweiler served as the senior consultant

Nationally recognized utility practice

The City will receive services from our dedicated utilities team. This team is a nationally recognized group of more than 300 professionals dedicated to meeting the diverse needs of water, sewer, electric and gas utility service providers, as well as diverse local government organizations. Baker Tilly currently works with more than 2,500 utility clients, including wholesale utility authorities and agencies, public power and investor-owned utilities, water, wastewater and reclaimed water utilities, river authorities, electric cooperatives, transit systems, renewable energy developers and joint action agencies.



Baker Tilly's depth of specialized expertise and knowledge of our utility industry team is recognized across the country. We provide accounting and advisory services to utilities throughout the United States and are sought out by leading organizations such as the Water Environment Federation (WEF), American Water Works Association (AWWA) and American Public Power Association (APPA) to speak on hot topics, teach courses and represent the industry. Our team members are adept at communicating with federal, state and other regulatory agencies and stay current with issues that affect the industry.

This focus on industry specialization means Baker Tilly's utilities team brings a balance of technical skill, industry insight and common sense to our work with you. For more than 80 years, Baker Tilly has provided utilities with a range of accounting and advisory services needed to operate effectively in a complex regulatory environment. Our professionals apply this industry knowledge and offer useful recommendations and insights to help your business.

National experience in performing utility rate analyses

For more than 50 years, our specialists have worked with communities to analyze the cost of serving utility customers and designing rates, reviewing connection/impact fees, exploring available financing for project improvements and performing long-range financial forecasting. We help as many as 50 utility clients each year plan for the future through long-term forecasting and planning for major capital projects that require creative rate and funding solutions. This experience gives Baker Tilly a broad view of industry issues and a specific familiarity with municipal utility goals.

Our staff members practice their craft with the knowledge, experience, skills and integrity to deliver what you ask and meet your goals. We also teach courses for industry associations at both the national and regional levels about cost-of-service and rate design principles for utility organizations and other financial matters affecting utilities. The City will benefit directly from our depth of knowledge. Some examples from the past three years include:

C. CONSULTANT QUALIFICATIONS / PROFILE

- “Rates, equity and cost-of-service,” presented to the Indiana Water Environment Association (IWEA)
- “Rate inequity: are your residents subsidizing the growth in your community?” presented to the Indiana Water Environment Association
- “Equitable stormwater rates: sustaining essential infrastructure,” presented at the Purdue Road School 2024 Transportation Conference & Expo
- “Equity in utility rate-making: math or affordability?” presented at the WEFTEC 2023 Annual Technical Exhibition and Conference
- “Regionalization” – A Case Study on the Combination of Two Public Utilities for the Common Good,” presented at the AWWA 2023 Annual Conference and Exposition (ACE23) Program
- “Inflation Reduction Act: Direct Pay Tax Incentives and Grants for Qualifying Utility Projects,” presented at the 2024 WEF/AWWA Utility Management Conference

Municipal advisor services

In addition to rate consultants, we regularly assist government authorities, utilities, state agencies, counties, cities, townships and school districts across the U.S. with their financial planning and the debt issuance process. We are passionate about serving public sector clients. That is why we created a top 5 independent municipal advisory practice within one of the nation’s largest and most diverse advisory and accounting firms. Baker Tilly has extensive experience and industry-specialized team members with both public finance and debt management (issuance, restructuring, policies, credit ratings, arbitrage compliance and investments); an attractive mix that will benefit the Village as we prepare the cost-of-service analysis and the potential impacts of any long-term financing needs.

Offering Minnesota clients our local and firmwide resources

Minnesota is an important national center for business innovation and economic growth. Recognizing this strategic importance, Baker Tilly has maintained a strong presence in the City’s state for more than 60 years, with two offices and more than 270 professionals to help clients in a wide range of sectors enhance and protect their value. You will receive exceptional service from a qualified local team that can draw on our firm’s broad national resources as your goals change or needs evolve.

Minnesota local presence

4,800+

Minnesota clients

Two offices

in the state of Minnesota

60+ years

of experience serving area clients

270+

professionals in the state of Minnesota



Baker Tilly office locations



C. CONSULTANT QUALIFICATIONS / PROFILE

LOCAL PRESENCE AND EXPERTISE TO SUPPORT THE CITY

The City can count on Baker Tilly's Minnesota presence to offer you an in-depth understanding of economic conditions, knowledge of regional and state regulations and on-the-ground assistance whenever needed.

Serving Minnesota communities through stewardship

Baker Tilly shares the City's belief in the power of community and is committed to making a difference through collective acts of service. During our firm's latest annual Stewardship Week, Baker Tilly team members participated in over 7,100 hours of volunteer activities in 54 communities to help build community in Minnesota and nationwide.

D. Key personnel

The Consultant shall provide the names, qualifications and resumes of key personnel that will be assigned to this work and identify the lead client service contact that will be responsible for the management and administration of a contract with the City.

Your main contact for the management and administration of a contract with the City will be Andre Riley. His contact information is provided below:

LEAD CLIENT SERVICE CONTACT

Andre Riley, Principal

+1 (317) 465 1537 | andre.riley@bakertilly.com

Leading the City's stormwater utility rate study services and uncovering opportunities along the way

Meet the stormwater utility rate study team we've assembled to achieve everything you envision. Selected intentionally for your goals and backed by our specialized resources, these individuals are collaborative and multidisciplinary. Their passion for the public sector will make them an unstoppable force on your behalf. You'll find their bios below and an organization chart in the next section. Complete resumes are available in the **Appendix**.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR THE CITY



Andre Riley – Principal

Role: Engagement Principal

Andre will oversee the engagement to make sure the City receives a meaningful, genuine experience. He will work with our engagement team to provide a seamless and well-planned engagement process, valuable solutions and technically accurate final deliverables to achieve your goals. Andre has over 20 years of experience working for municipally owned water, sewage and stormwater utilities determining utility revenue requirements, cost-of-service studies and financial planning for municipal debt financings.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR THE CITY



Mitchell Eschweiler, CPA — Director

Role: Project Manager

Mitchell has extensive experience preparing rate studies for municipal utilities, including cost-of-service rate studies. He also assists in the issuance of debt to finance capital improvements or refinance existing debt for water, sewer, stormwater, and electric utilities. Mitchell joined the firm in 2014 and has over a decade of experience. Mitchell will provide oversight of the quality and accuracy of key deliverables.



Courtney Holliday, CPA — Manager

Role: Assistant Project Manager

Courtney's experience includes financial studies and projects for municipally owned water, sewage, stormwater and electric utilities, not-for-profit, regional water and sewer districts, and conservancy districts. Her work on client projects also involves municipal debt financings, financial analysis and determining utility revenue requirements, cost-of-service studies and financial planning associated with capital acquisition.



Elizabeth Bergman — Principal

Role: Relationship Manager

Elizabeth is a principal in Baker Tilly's Municipal Advisory practice, offering strategic, independent guidance to local governments, utilities, and higher education clients throughout the Midwest. With over 20 years of public finance experience—including early work as a rating analyst at a global credit rating agency—she specializes in planning, structuring, and executing public finance transactions to support infrastructure and economic development goals. Elizabeth has led more than \$400 million in transit expansion financing, advised on STAR bond-funded economic development projects, and served as lead advisor on over \$1 billion in higher education deals. She brings expertise across sectors such as utilities, economic development, higher education, transit, and more, and regularly advises clients on rating strategies, investor outreach, and achieving credit upgrades.



Christine M. Hogan — Director

Role: Relationship Manager

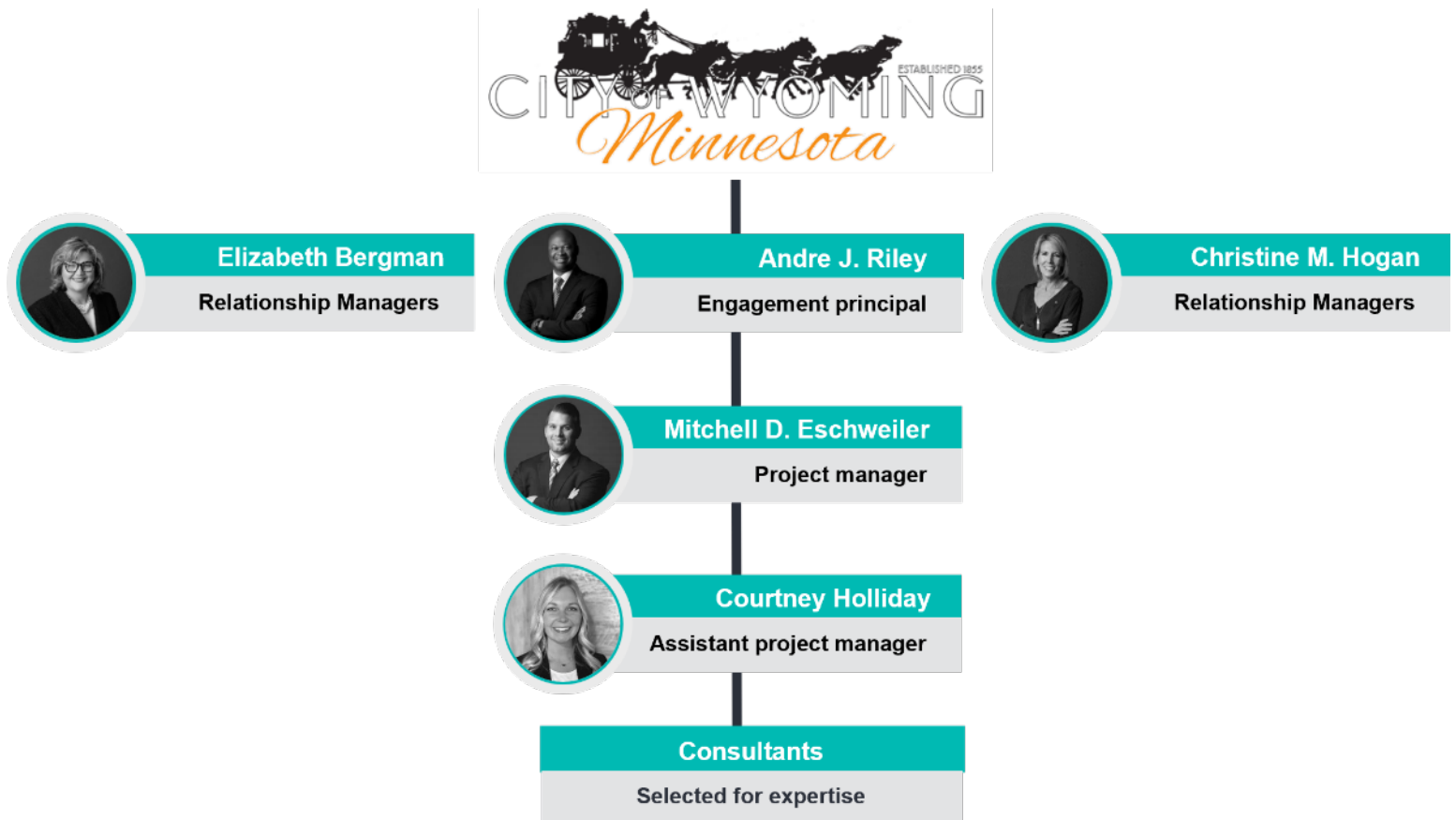
Christine is responsible for all aspects of debt issuance including structuring debt, reviewing financing options, developing recommendations detailing financing plans, reviewing legal documents, and personally assisting clients for the Minnesota, Kansas, Missouri and Wisconsin teams. She has extensive knowledge of various types of financing including economic development, sales tax and special tax-back financing, general obligation and utility revenue.

AN INTEGRATED TEAM WORKING TOGETHER FOR SUCCESS

Each professional on your team was selected for a reason, but it's our collective brainpower and collaboration that will ultimately make a difference for the City.

E. Organizational structure

The proposal must include the organizational/project management structure identifying key project personnel, their roles and responsibilities and the time available for each individual to work on this project.



F. Project approach/work plan

A detailed explanation of the overall approach to be taken to complete the project along with detailed work plan must be provided. The work plan must contain a description of each task to be performed, identify the interrelationships among the tasks, clearly identify major review and decision points and specify the deliverables and work products for each task. The work plan must address, at a minimum, each of the items outlined under Scope of Services Section in the RFP.

Achieving your objectives

Baker Tilly has extensive experience with financial asset management plans, long-term financial cash flows and utility rate design for stormwater systems. Our utility specialization uniquely qualifies our firm to provide value-added consulting services to the City. Our dedicated professionals will provide realistic ideas and solutions to your challenges. We understand your unique business needs, and our principal objective is to provide you with strategic insights and assist you in achieving your long-term goals.

Baker Tilly prepared the prior rate study in 2020 and understands the City operates a Surface Water Management Utility (the “Stormwater Utility”) beginning in December of 1997. The Stormwater Utility is operated as a public utility pursuant to Minnesota Statue Section § 444.075. The incorporating ordinance includes aspects to develop and implement six minimum controls for the Stormwater Utility including public education and outreach, public participation and involvement, illicit discharge detection and elimination, construction site runoff control and pollution prevention. We also understand the system includes catch basins, manholes, channels and underground pipes that need to be maintained. This network is designed to allow time for rainwater to sit and pollutants to settle out. Ultimately, the rainwater is discharged into the Sunrise River after working its way through stormwater system.

We also understand that stormwater rates need to be developed not only to support on-going operations and maintenance in the Surface Water fund (SWF) but to also be fair and equitable to stormwater system users. We understand the stormwater fees and charges, as shown below, were designed to recover revenues based on impact on the stormwater system due to a given properties land use designation and impervious surface area which is common in the industry. Our experience with the City and other stormwater systems will help us develop a stormwater user fee model that continues to support the stormwater system (to properly fund the SWF and allow for recommended minimum cash balances) today and into the future. If selected to provide this next stormwater study, we would discuss other methods to bill customers and the pros and cons to each method.

UTILITY FEES & CHARGES

Surface Water

Agricultural & Residential Uses	\$9.74/parcel
High Density Residential	\$78.88/acre
Manufactured Homes	\$78.88/acre
Commercial	\$78.88/acre
Central Business	\$78.88/acre
Office & Health Care	\$78.88/acre
Industrial (Urban)	\$102.25/acre
Industrial (Non-Urban)	\$9.74/parcel

Funding replacements and improvements of critical infrastructure

Baker Tilly for decades has assisted communities with developing financial solutions and creative strategies to fund capital improvement projects. Many of these projects involve working collaboratively with public works officials and utility staff, consulting engineers, stakeholder groups, state and federal agencies and state revolving fund loan programs. Whether it's end-of-useful life projects, growth related projects or state/federally mandated projects, there is a funding decision framework a community must follow.

Communities must determine a framework that evaluates whether to fund infrastructure projects using rate funded cash (pay-go) or long-term financing to best suit project needs. While also considering maintaining recommended cash reserve levels and liquidity, customer affordability, debt policies, accessibility of capital markets and leverage ratios.

The funding decision framework should include items such as:

- Project Assessment including an analysis of the following components:
 - Strategic importance of the project for the City or Utility
 - Useful life of the asset
 - Overall cost of the project
- Financial Capacity
 - Pros and Cons of cash vs debt funding including analysis of:
 - Available reserves to fund the project
 - Rate flexibility, including the rates needed to support the project through financing vs. through the generation of cash
 - Debt ratios and credit rating
 - Grant availability
- Costs Analysis – Cash vs. Debt
 - Total costs, including financing costs and issuance costs
 - Opportunity cost
 - Financing terms including the current market as it relates to interest rates
- Policy & Governance Alignment
 - State, federal and local requirements
 - Internal policies
 - Legal constraints
 - Stakeholder support
- Final Decision Matrix
 - Funding through cash or
 - Funding through debt

Project approach and proposed methodology

The following section details our approach to conducting the stormwater analysis.

Phase 1 – Kick-Off- Meeting and Creation of a Customized Plan Unique to the City of Wyoming

- **Ensure long-term financial sustainability:** Develop a financial framework that supports the City's stormwater over the next five years, ensuring sufficient revenue for operations, maintenance, and capital improvements.
- **Promote fair and equitable cost distribution:** Establish a rate structure that fairly allocates costs among customer classes, including residential, commercial, industrial and institutional customers, while maintaining affordability and financial stability
- **Enhance financial planning and decision-making:** Provide a comprehensive financial model and forecasting tools to help the City make informed decisions regarding rate adjustments, capital investments, and financial strategies.
- **Increase transparency and public understanding** - Deliver clear, well-documented findings and recommendations to City staff, elected officials, and the public to foster trust and informed decision making.
- **Ensure resilience against future challenges:** Develop adaptable financial and rate structures that account for uncertainties such as regulatory changes, market fluctuations, and evolving energy demands.

Baker Tilly's project management philosophy relies on communication and client/project team involvement. As a firm, we follow the strong project management principles and practices of the Project Management Institute.

Kickoff meeting

The kick-off meeting will set the tone for the project, reaffirming goals and expectations of the engagement and establishing benchmarks for completion of project segments. Points of responsibility, the City's hours commitment and development of the meeting cadence, and if they should be held virtually or in person, will be established to help the project run smoothly and provide maximum value.

Project work plan approval

This proposal includes an illustrative project plan that we have developed based on the RFP and our experience performing cost-of-service and rate design studies for communities with a similar scope of services. As part of the project kick-off, we will discuss our proposed work plan with the City, revise as needed and obtain the City's concurrence with the final draft prior to initiating the project

F. PROJECT APPROACH/WORK PLAN

TASKS	ENGAGEMENT KICK-OFF MEETING STEPS
1	Attend kick-off meeting with City's Project Management Team (PMT)
2	Establish points of contact and responsibility for the PMT.
3	Agree on project schedule milestones.
4	Establish communication protocols and frequency.
5	Discuss overall logistics of information and data delivery.
6	Finalize work plan with management's approval.
7	Discuss the initial data request for information needed to complete the study.

Meetings: On-site meeting with City of Wyoming's Project Management Team (PMT)

Deliverables: Approved Project Plan, project schedule and data request

Phase 2 – Review Historical Stormwater System and Operating Data

TASKS	REVIEW OF HISTORICAL DATA
1	Assemble and review historical stormwater financial data (Surface Water Fund).
2	Review current rate structure.
3	Review customer billing data by classes and sufficiency of revenue recovery.
4	Review existing stormwater policies, goals and objectives.
5	Discuss potential changes to stormwater operations and any pending national or state regulatory changes.
6	Discuss necessary capital improvements and funding options.

Meetings: Virtual check-in meetings to discuss data and questions with the PMT

Deliverables: Develop an understanding of historical operations of the stormwater utility, policies, future operation and capital needs, and discuss and provide recommendations on customer classifications and approval from the PMT

Phase 3 – Develop Revenue Requirements

TASKS	REVENUE REQUIREMENTS
1	Based on information received and discussions with the PMT, develop a five year projection of operation and maintenance costs.
2	Estimate future billing, collection, administrative and general costs for the next five years.
3	Estimate additional revenue requirements for the stormwater including future repairs and maintenance and capital improvements.
4	Develop a funding plan for future infrastructure needs.
5	Determine on-going revenue offsets such as interest income and miscellaneous fees to the revenue requirements.
6	Determine sufficiency of current stormwater rates

Meetings: Virtual meeting with the PMT to discuss revenue requirements

Deliverables: Five years of revenue requirements to support future stormwater operations and infrastructure needs

Phase 4 – Cash Flow Modeling

TASKS	CASH FLOW MODELING
1	Develop a five-year cash flow model, laying out future revenues, expenses and capital improvements of the stormwater system.
2	Prepare various scenarios to show the PMT the impacts of various levels of increases, including a “what if” scenario for no increases in stormwater rates.
3	Recommend various levels of stormwater increases.
4	Update five-year stormwater model to show impacts of various levels of stormwater increases and the sufficiency of the future revenues to support on-going operations.
5	Develop recommendations for appropriate cash reserve levels to support future operations and capital needs.
6	Evaluate and compare the proposed and current rates for a typical residential user to the rates of a least 10 nearby and similar sized communities
7	Establish new stormwater rates for 2026 – 2030.

Meetings: Virtual meeting with the PMT to review cash flow models

Deliverables: Cash flow model for various levels of increases

Phase 5 – Report delivery and presentation

We will prepare a draft report for PMT report and discussion. The PMT can ask questions, offer comments and request changes for inclusion in the final report and recommendations.

Baker Tilly has a thorough quality review program that we institute on every project. The studies will go through three layers of review by managers, directors and principals experienced with rate studies. We

F. PROJECT APPROACH/WORK PLAN

will prepare the draft report for the PMT review and discussion. We will edit the report after our discussion and issue the final report and recommendations.

TASKS	REPORT DELIVERY, PRESENTATION AND QUALITY CHECKS
1	Perform quality check procedures
2	Prepare and provide a copy of the draft report.
3	Meet with PMT and other City officials to review draft report.
4	Incorporate suggested revisions into report for preparation of a final report and presentation.
5	Attend two City Council meetings and workshops to discuss the final report and recommend actions.
6	Assist with preparation of ordinance and other steps required to implement recommended stormwater rates.
7	Provide final bound copy of the report including all tables, charts, graphs, figures and maps.
8	Provide PDF copy of the report and four paper copies

Meetings: Meeting to discuss draft report, final in-person report presentation to City Council

Deliverables: Draft report, final report for presentation to City Council

ITEM	DELIVERABLE	METHOD OF DELIVERY
1	Final report including the following information: a. Projected financial results for 2026 – 2030 including tables and exhibits b. Assumptions and methodologies used in developing the revenue requirements and designing rates c. Executive overview addressing significant issues and overall recommendations	Electronic copies
2	PowerPoint presentation for potential public meetings outlining and summarizing the results and recommendations included in the final report.	Electronic copies
3	Any proposed amendments to city rate ordinances	Word version for edits
4	Bi-weekly updates	Emailed pdf updates
3	The Excel model used in developing the revenue requirement, cost of service, and rate design study to be accessible by the City for future updates	Excel model

We feel that frequent communication with the City Project Manager and utility management is important to completing a successful project and study.

The full listing of proposed meetings and communications for this project is shown in the following table:

F. PROJECT APPROACH/WORK PLAN

ITEM	MEETING TYPE	MEETING FORMAT
1	Initial kick-off meeting	In-person meeting
2	Information gathering and analysis	Web meeting
3	Bi-weekly status updates	Web meetings
4	Presentations to PMT (3 additional meetings) – updates, report presentations, model training	In-person meetings
5	Presentations to the City Council	In-person meeting
6	Public presentation	On-site at City Council meeting

The meeting frequency and method can be adjusted to meet City of Wyoming's required schedule.

Phase 6 – Public information activities

Public outreach and buy-in for rate changes are essential and required parts of the process. Although the public may not always welcome rate changes, providing information on the reasons behind these changes, the necessity of rate adjustments to maintain reliable and affordable service, and regulatory publishing requirements can enhance public understanding.

A public participation plan is an excellent step to increase customer awareness and understanding of rate development. Providing affordable and reliable service depends on City Council's ability to approve prudent rate adjustments. This project's plan will outline strategies we have used with other utilities, including presentation at a public meeting, a potential public listening session, and providing materials for websites, social media, and other communication tools. We will also work closely with the PMT to craft the plan and materials. Materials will be provided for staff review two weeks prior to a public event. We understand posting requirements may accelerate timelines.

Phase 7 – Rate model

The project deliverables include the Excel model used in developing the revenue requirement, cost of service, and rate design study. We will provide the City with documentation in its use, training, and assistance/information on updating the model for future analysis.

Describing the records and documentation required from the City

Below is an illustrative list of the items that will be required from the City to complete the water and sewer rate studies:

- Audited financials for the prior three fiscal years
- Detailed budgets for the prior three fiscal years
- Access to detailed revenue and expenses data
- Detailed capital asset ledgers
- Five-year capital improvement plans
- Customer billing data for prior 12-month period and usage and counts for prior 10-years to assist with analysis of future growth or decline in rate base
- City population projections for the five-year period
- Information from management regarding estimated future adjustments in operational expenses such as payroll, benefits, materials and supplies, etc.

F. PROJECT APPROACH/WORK PLAN

- Outstanding rate ordinances or resolutions
- Access to existing City policies for items such as debt, cash reserves, etc.

G. Project schedule

The proposal must identify the major tasks and dates of accomplishment. The schedule must indicate tasks which the Consultant anticipates will be done by the City. Work on this project should be initiated within two weeks of the execution of the contract and diligently performed thereafter. The schedule will be monitored by the City to evaluate the Consultant's performance on the project. Any deviation from the milestones as proposed by the Consultant shall be approved by the City.

Delivering a project schedule to meet the City's expectations

The chart below represents our customized approach to deliver stormwater utility rate study services to the City on time. And it's just our starting point. We'll collaborate closely with you to finalize a client service plan that meets all your needs — especially your timing.

	2025											
ACTIVITY	OCT		NOV						DEC			
Contract start date												
Kick off meeting with City Staff (1)												
Initial information request provided by Baker Tilly												
City completes information request												
Stormwater (including development of 5-year financial model)												
Present draft reports to PMT (2)												
PMT review and comments												
Final reports and models delivered												
Presentation to City Council (1)												
Project management and communication, bi-weekly check-ins												

(1) DENOTES IN-PERSON MEETINGS

(2) DENOTES VIRTUAL MEETINGS

OUR COMMITMENT TO THE CITY

Working closely with you and your team, we will co-develop a timeline to deliver on time or ahead of schedule.

Baker Tilly recognizes that our approach must be flexible and adaptable. We will maintain open communication throughout the engagement and adjust the approach and timing as required. As appropriate interviews, focus group sessions, workshops and reviews of deliverables will be conducted remotely and/or onsite.

H. Cost

A detailed cost estimate for completing the project, broken down by task, personnel and hours must be provided. Please identify the personnel that correspond to each title in the cost estimate. The proposal must indicate the total cost and itemize each task for the project. The proposal should include hourly rates for specific professional services, including meeting and presentation costs. Any work identified as optional in the Scope of Services shall be listed separately from required work. A total cost not to be exceeded for all work is required by the proposal.

Sharing our transparent fee estimate

Value means more than simply checking boxes and meeting your requirements. Value means services that lead to meaningful insights, help improve efficiencies and direct more dollars and resources to achieving the City's objectives.

The City's fee estimate is based on what we've learned is important to you. We'll go beyond what's expected to deliver a return on your investment. We have prepared a **not-to-exceed service fee of \$14,500**, based on the needs and objectives you have shared and our experience conducting similar strategic planning projects with public sector clients. A detailed budget of the optional activities can be provided upon request.

Please refer to the table below for a breakdown of project phases and estimated associated costs.

SERVICES FOR THE CITY	FEES
Phase 1 – Kick-off-meeting	\$2,000
Phase 2 – Revenue of Historical Data	2,000
Phase 3 – Revenue Requirements	3,500
Phase 4 – Cash Flow Models	3,000
Phase 5 – Report Delivery and Presentation	2,000
Phase 6 – Public Information Activities	1,000
Phase 7 – Rate Model	1,000
TOTAL FOR ALL SERVICES	\$14,500

OUR TRANSPARENT, FAIR FEE ESTIMATE

The City can expect a competitive fee arrangement and continuous value.

Delivering services above the standard — at standard hourly rates

When you need us, we step in to help, even outside the scope of our engagement. If the service you need is out of scope, we'll let you know and get your approval. Whenever possible, we'll give you an estimate in advance, outlining the time and expense we believe we'll need to achieve your objectives.

Any fees will be based on our standard rates shown below. Before we send a final invoice, we confirm that you've received the value you deserve.

STANDARD HOURLY RATES	
STAFF LEVEL	HOURLY RATES
Engagement Principal	\$350

H. COST

Project Manager/ Relationship Manager	\$235
Assistant Project Manager	\$175
Consultant	\$150

DELIVERING BEYOND THE STANDARD

When the City needs additional services, we're flexible and accessible, standing ready to serve your needs beyond the scope of our engagement.

No unnecessary charges

You won't see add-on charges for routine calls, emails or quick consultations. They're included in our fees because we're here to earn your trust. If your need is out of scope, we'll never perform additional work unless you give us the go-ahead. Our final billing will always be based on the value we deliver to you.

Key assumptions

We based our fee estimate on your needs. If any of the assumptions below change, we'll share any new requirements, budgetary considerations and options.

ASSUMPTIONS

- Adequate support, preparedness, cooperation and feedback from management
- The City will provide resources to assist with coordination activities such as scheduling, gathering contact information and securing project team space
- Appropriate staff will be available per the agreed-to schedules
- Baker Tilly will have access to, and be provided with, electronic or other readily available data, without the need to conduct data extraction
- Information will be provided within the specified timeframes and format
- No significant changes in scope

Exceptions and deviations

Any exceptions to the requirements in this RFP, including the language in the Contract Negotiations and Terms Section, must be included in the proposal submitted by the Proposer. Segregate such exceptions as a separate element of the proposal under the heading "Exceptions and Deviations."

We hereby take exception to the provisions detailed in the attached exceptions table. If selected, we will require the ability to propose additional terms and negotiate mutually acceptable revisions to these sections prior to executing a final contract.

Exceptions to City of Wyoming, MI RFP

Page No.	Section/ Paragraph No.	Proposed Revision
Exceptions to Contract Negotiations and Terms		
10	B.8	If selected, we reserve the right to negotiate mutually agreeable terms as to ownership of deliverables and documentation.
11	B.11	If selected, we reserve the right to negotiate mutually agreeable terms as to indemnification.
11-12	B.12	We propose revising this section as follows: The Consultant will need to further agree that in order to protect itself as well as the City under the indemnity provision set forth above, it will at all times during the term of the Contract keep in force the following minimal insurance protection in the limits specified: Commercial General Liability (or in combination with an umbrella policy) • \$2,000,000 Each Occurrence • \$2,000,000 Products/Completed Operations Aggregate • \$2,000,000 Annual Aggregate The following coverages shall be included: • Premises and Operations Bodily Injury and Property Damage • Personal and Advertising Injury • Blanket Contractual Liability • Products and Completed Operations Liability Automobile Liability • \$2,000,000 <u>\$1,000,000</u> Combined Single Limit – Bodily Injury & Property Damage • Including Owned, Hired & Non-Owned Automobiles Workers' Compensation Workers' Compensation insurance in accordance with the statutory requirements of the State of Minnesota, including Employer's Liability with minimum limits are as follows: • \$500,000 – Bodily Injury by Disease per employee • \$500,000 – Bodily Injury by Disease aggregate • \$500,000 – Bodily Injury by Accident

EXCEPTIONS AND DEVIATIONS

		The City shall be named as an additional insured on the general liability and umbrella policies policy on a primary and non-contributory basis. The Consultant shall secure and maintain a professional liability insurance policy. Said policy shall insure payment of damages for legal liability arising out of the performance of professional services for the City, in the insured's capacity as Consultant, if such legal liability is caused by a negligent act, error or omission of the insured or any person or organization for which the insured is legally liable. The policy shall provide minimum limits of \$2,000,000 with a deductible maximum of \$125,000 unless the City agrees to a higher deductible. Prior to the effective date of the Agreement, the Consultant will furnish the City with certificates of insurance as proof of insurance for general Liability and Auto Liability. Any policy obtained and maintained under this clause shall provide that it shall not be cancelled, materially changed, or not renewed without thirty days' notice thereof to the City.
Exceptions to Appendix C: Professional Services Agreement		
15	5	We propose amending this section as follows: <u>Subject to Consultant's rights in Contractor Knowledge, defined below,</u> The City shall be the owner of all documents, reports, studies, analysis and the like prepared by the Consultant in conjunction with this contract. <u>Notwithstanding the foregoing, Consultant will maintain all ownership right, title and interest to all Contractor Knowledge. For purposes of this Agreement "Contractor Knowledge" means Consultant's proprietary programs, modules, products, inventions, designs, data, or other information, including all copyright, patent, trademark and other intellectual property rights related thereto, that are (1) owned or developed by Consultant prior to the Effective Date of this Agreement ("Contractor's Preexisting Knowledge") (2) developed or obtained by Consultant after the Effective Date, that are reusable from client to client and project to project, where the City has not paid for such development; and (3) extensions, enhancements, or modifications of Contractor's Preexisting Knowledge which do not include or incorporate the City's confidential information. To the extent that any Contractor Knowledge is incorporated into the Work Product, Consultant grants to the City a non-exclusive, paid up, perpetual royalty-free worldwide license to use such Contractor Knowledge in connection with the Work Product, and for no other purpose without the prior written consent of Consultant.</u>
17	6	We propose amending the section as follows: Consultant warrants that it shall exercise the same degree of care, skill, and diligence in the performance of the services as is ordinarily possessed and exercised by members of the profession under similar circumstances in Dakota County, Minnesota. <u>The City's sole and exclusive remedy for a breach of Consultant's warranty will be for Consultant, in its sole discretion, to either: (i) use its reasonable commercial efforts to re-perform or correct the Services, or (ii) refund</u>

EXCEPTIONS AND DEVIATIONS

		the fee the City paid for the Services that are in breach of Consultant's warranty. The City must make a claim for breach of warranty in writing within thirty (30) days of the date that the Services that do not comply with Consultant's warranty are performed. This warranty is voided in the event that the City makes alterations to the Services provided by Consultant or to the environment in which the Services are used (including the physical, network and systems environments) that are not authorized in writing by Consultant. If the City does not notify Consultant of a breach of Consultant's warranty during that 30-day period, the City will be deemed to have irrevocably accepted the Services. Consultant shall be liable to the fullest extent permitted under applicable law, without limitation, for any injuries, loss or damages proximately caused by Consultant's breach of this standard of care. City shall not be responsible for discovering deficiencies in the accuracy of Consultant's services. Consultant shall be responsible for the accuracy of the work and shall promptly make necessary revisions or corrections resulting from errors and omissions on the part of Consultant without additional compensation.
17	8	We propose revising this section as follows: The Consultant shall indemnify and hold harmless the City, its officers, agents, and employees, of and from any and all claims, demands, actions, causes of action, including costs and attorney's fees, arising out of or by reason of the execution or performance of the work or services provided for herein to the comparative extent they are caused by finally determined to be the direct result of Consultant's <u>grossly</u> negligent acts or omissions or those <u>grossly</u> negligent acts or omissions of persons for whom Consultant is legally responsible.
18	10	We propose revising this section as follows: The Consultant will need to further agree that in order to protect itself as well as the City under the indemnity provision set forth above, it will at all times during the term of the Contract keep in force the following minimal insurance protection in the limits specified: Commercial General Liability (or in combination with an umbrella policy) • \$2,000,000 Each Occurrence • \$2,000,000 Products/Completed Operations Aggregate • \$2,000,000 Annual Aggregate The following coverages shall be included: • Premises and Operations Bodily Injury and Property Damage • Personal and Advertising Injury • Blanket Contractual Liability • Products and Completed Operations Liability Automobile Liability • \$2,000,000 <u>\$1,000,000</u> Combined Single Limit – Bodily Injury & Property Damage • Including Owned, Hired & Non-Owned Automobiles Workers' Compensation Workers' Compensation insurance in accordance with the statutory requirements of the State of Minnesota, including Employer's Liability with minimum limits are as follows:

EXCEPTIONS AND DEVIATIONS

	• \$500,000 – Bodily Injury by Disease per employee • \$500,000 – Bodily Injury by Disease aggregate • \$500,000 – Bodily Injury by Accident The City shall be named as an additional insured on the general liability and umbrella policies policy on a primary and non-contributory basis. The Consultant shall secure and maintain a professional liability insurance policy. Said policy shall insure payment of damages for legal liability arising out of the performance of professional services for the City, in the insured's capacity as Consultant, if such legal liability is caused by a negligent act, error or omission of the insured or any person or organization for which the insured is legally liable. The policy shall provide minimum limits of \$2,000,000 with a deductible maximum of \$125,000 unless the City agrees to a higher deductible. Prior to the effective date of the Agreement, the Consultant will furnish the City with certificates of insurance as proof of insurance for general Liability and Auto Liability. Any policy obtained and maintained under this clause shall provide that it shall not be cancelled, materially changed, or not renewed without thirty days' notice thereof to the City.
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J. Additional information

Any other information that the Proposer believes to be pertinent, but not specifically asked for elsewhere in the RFP, may be included under the heading "Additional Information."

Guiding you with our resources, reputation and reach

Baker Tilly at a glance

At Baker Tilly, we bring a legacy and commitment to helping our clients embrace what's next.

With more than 11,000 professionals from coast to coast, our resources fuel our ability to offer clients deep industry insights, bold thinking and holistic solutions. Our ranking as the sixth-largest advisory CPA firm means we're actively shaping the industry landscape across markets.

Our size isn't just a number

It's a testament to our resilience and ability to lead you into the future, no matter the climate. With nearly a century of experience, we've honed our skills and adapted to evolving markets.



6th-
largest U.S.
accounting firm



11,000+
team members,
1,000+ principals



90+
years in
business



~3,400
Certified Public
Accountants



\$3B+
firm revenue
in FY2025



100+
worldwide office
locations



300+
workplace and
culture awards

GIVING YOU THE TOOLS YOU NEED TO NAVIGATE THE FUTURE

Baker Tilly will successfully guide the Village through changing landscapes with skills, stability and strength as one of the oldest and largest advisory, tax and assurance firms in the United States.

What does our size mean for you? It's about having a powerhouse team of passionate professionals unafraid to roll up their sleeves and provide hands-on support for the Village. It's about team members brimming with thoughtful ideas, backed by the scale of a firm genuinely dedicated to your success.

When you choose Baker Tilly, you're not just choosing a leading advisory, tax and assurance firm. You're choosing a skilled navigator for the road ahead.

Bringing greater value, relationships and resources to our clients: Baker Tilly and Moss Adams have joined forces

On June 3, 2025, Baker Tilly and Moss Adams combined to redefine advisory and accounting services for our clients. The merger, which makes Baker Tilly the sixth-largest advisory CPA firm in the United States, brings deeper industry specialization, broader geographic reach and expanded capabilities to the Village.



K. References

For the key personnel, include a brief list of previous or current project contacts that are similar to this project that may be used as references to confirm that the key personnel are capable of performing this work.

Demonstrating that we've been down this path before

The experiences of our clients speak more about Baker Tilly's capabilities than any proposal ever could. That's why we encourage you to talk with our clients. Here are a few individuals who welcome the opportunity to share their Baker Tilly experience.

Each will give you an authentic perspective as you consider your own needs.

CITY OF EAST CHICAGO (IN)			
Name	Winna Guzman	Title	Director, East Chicago Department of Water Works
Phone	+1 (219) 391 8469	Email	wgzman@eastchicago.com
Name	Joe Allegretti	Title	Counsel, East Chicago Sanitary District
Phone	+1 (219) 765 4074	Email	joe@joeallegretti.com
Services	Water, sewer and stormwater cost-of-service studies, regulatory rate proceedings and financings, 2013 to present		

FORT WAYNE CITY UTILITIES (IN)			
Name	Justin Brugger	Title	Controller and Chief Financial Officer
Phone	+1 (260) 427 1234	Email	Justin.Brugger@cityoffortwayne.org
Services	Water, wastewater, stormwater rate studies, cost-of-service studies, revenue bond financings, and wholesale rate design. Services provided from 2016 to present.		

CITY OF BETTENDORF (IA)			
Name	Decker Ploehn	Title	City Administrator
Phone	(563) 344 4007	Email	dploehn@bettendorf.org
Services	Preparation of a sewer rate study model. The sewer model includes a 10-year analysis of on-going operations and critical infrastructure improvements.		

EXPERIENCE MATTERS. ESPECIALLY THE EXPERIENCE OUR CLIENTS RECEIVE
Connect with our clients to learn more. Additional references are available by request.

Appendix: Resumes

PRINCIPAL

Andre J. Riley

Andre J. Riley is a principal with Baker Tilly.



Baker Tilly Advisory Group, LP

9229 Delegates Row
Indianapolis, IN 46240
United States

T: +1 (317) 465 1537
andre.riley@bakertilly.com

bakertilly.com

Years with Baker Tilly: 21

Education

Master of Professional
Accountancy
Indiana University

Bachelor of Science in business
economics
University of Kentucky

Registered Municipal Advisor with
the Securities and Exchange
Commission (SEC)

Project role

Andre will oversee the engagement to make sure the City receives a meaningful, genuine experience. He will work with our engagement team to provide a seamless and well-planning engagement process, valuable solutions and technically accurate final deliverables to achieve your goals.

Profile

Starting with baker Tilly in September 2003, Andre brings 20 plus years of experience serving municipally owned water, sewage and stormwater utilities, not-for-profit water, regional water and sewer districts and conservancy districts. These projects often involve municipal debt financings, financial analysis and determining utility revenue requirements, cost-of-service studies and financial planning associated with capital acquisition. Andre assists utility clients with financial management services, including financial management reports, financial accounting and reporting budget services and utility controller assistance.

Key project experience

- **Fox River Water Reclamation District, Illinois** – cost-of-service study and rate model
- **City of Evansville, Indiana** -- sewer cost-of-service, water and sewer capital planning and financings, and CSO LTCP services
- **City of Lawrence, Indiana** – water and sewer cost-of-service studies
- **City of St. Paul, Minnesota** -- sewer and stormwater cost-of-service studies and rate model
- **City of East Chicago, Indiana** – water and sewer cost-of-service studies, regulatory rate proceedings and financings and stormwater rates
- **City of Muncie, Indiana** -- sewer cost-of-service study, CSO LTCP services and financings
- **Village of Elburn, Illinois** – water rate study, system development charge study
- **City of Bettendorf, Iowa** – sewer rate study (in progress)
- **Village of Woodstock, Illinois** – water and sewer cost-of-service studies (in progress)
- **Porter County, Indiana** – Establishment of stormwater district

Please see attachment for details about these projects.

PRINCIPAL

Andre J. Riley

Page 2

Specific experience

- Financial reporting, strategic planning and utility rate management for utilities
- Capital project planning for utilities
- Asset management planning for utilities
- Utility cost of service studies and rate design
- System development/capacity fee studies
- Wholesale rate development and assistance with intergovernmental contract negotiations
- Bond financing through the open market, State Revolving Fund, etc.
- Controller assistance
- Provides assistance with consent decree negotiations with U.S. Environmental Protection Agency (EPA) tools and state regulatory environmental agencies

Industry involvement

- President, AIM Corporate Partner Advisory Committee, 2020-2021
- Indiana Water Environment Association (IWEA)
- Indiana Section American Water Works Association
- American Water Works Association (AWWA)
- Indiana Rural Water Association
- Alliance of Indiana Rural Water
- AICPA and Indiana CPA Society
- ILMCT Clerk's Institute
- AIM Board of Directors

Community involvement

- Special Olympics Partner

Thought leadership

- Presenter before industry groups related to municipal finance and utility rate making

Continuing professional education

- American Institute of Certified Public Accountants
- Registered Municipal Advisor with the Securities and Exchange Commission (SEC)
- Registered Municipal Advisor and Principal with the Municipal Securities Rulemaking Board (MSRB)
 - Series 50,
 - Series 54

Andre J. Riley – Specific project involvement

Fox River Water Reclamation District, Illinois

Cost-of-service study and rate model

Andre served as an engagement principal for the Fox River Water Reclamation District, (FRWRD) a large regional sewer district located in South Elgin, IL providing sewer pumping and treatment and disposal services in Kane and Cook Counties. In 2023, Baker Tilly was engaged by FRWRD to prepare cost-of-service study. FRWRD was developing a sizable 5-year capital improvement program to be funded by a mix of rate funded (pay-go) and long-term financings. Baker Tilly conducted several meetings to develop a priority list of management's pricing objectives. These objectives were used to develop a new rate structure for FRWRD's customers and allow more consistent revenue recovery. The new rate structure went from flow only charges for each of the customer classes to now include base charges by meter size. FRWRD also provides wholesale treatment service based on contracts and those cost allocation methodologies were not changed and included in the cost-of-service.

Baker Tilly worked with the FRWRD to develop minimum reserve levels for the various funds already established, along with a systematic process of how the revenues would be allocated between funds.

City of Evansville, Indiana

Sewer cost-of-service, water and sewer capital planning and financings, and CSO LTCP services

Andre served as the project manager for the cost-of-service studies for the City of Evansville's (City) sewer utility. Baker Tilly was engaged in 2012, 2013 and 2016 by the City to perform a cost-of-service study. Baker Tilly prepared a financial plan, revenue requirements and suggested restructuring the rate structure from declining rate blocks plus a base charge by meter size. To a flow rate by various customer classes plus a base charge by meter size. The City was in negotiations with the U.S. EPA, U.S. Department of Justice and state regulators regarding a Consent Decree to address combined sewer overflows (CSOs) and the Clean Water Act. Baker Tilly developed a special flow rate by customer class, as part of this restructuring, to recover revenues to fund the capital program to address the CSOs (Long-Term Control Plan (LTCP)).

In other engagements with the City from 2004 to 2021, Andre served as the lead consultant or project manager for both the water and sewer utilities as a municipal advisor on assisting the City issue over \$500 million in revenue bonds for capital investments.

The City engaged with Baker Tilly in 2006 to provide rate consultation, modeling and negotiation services for the Consent Decree and CSO LTCP. Andre through 2021 served as consultant, lead consultant and project manager for this ongoing engagement.

City of East Chicago, Indiana

Water and sewer cost-of-service studies, regulatory rate proceedings and financings

Andre served as the engagement principal for several engagements to conduct cost-of-service studies for the City of East Chicago's (City) water and sewer utilities. In 2021 and 2022 the City engaged with Baker Tilly to develop cost-of-service studies for the sewer and water utilities, respectively. The reports focused on the cost of operations, capital needs, other applicable revenue requirements and the proper allocation of revenue requirements between the city's large industrial base and the residential customer class.

The City has also engaged Baker Tilly to serve as rate consultant in the City's respective rate processing with before the Indiana Utility Regulatory Commission (IURC). Once the respective utility boards approve the updated rates and charges based on the cost-of-service studies. The final approval of a revised schedule of rates lies with the IURC. As rate consultant to the City for the respective rate proceedings.

Baker Tilly prepares an accounting report, written testimony, exhibits and workpapers as support for the revised schedule of rates. In addition, as rate consultant, works with the City's contracted legal counsel to advise on the City's other team members filed testimony and exhibits. As the rate proceeding moves forward Baker Tilly will provide assistance in reviewing the rate filing of the Office of Utility Consumer Counselor (OUCC), the rate payer's advocate, responses to OUCC discovery request, negotiations and testimony for a settlement with the OUCC and any intervenor in the proceeding.

Baker Tilly has been engaged with the City since 2012 for the sewer utility, and 2019 for the water utility; to serve as municipal advisor on utility financings to raise funds for capital projects.

Finally, Baker Tilly is currently engaged with the City for updated cost-of-service studies for the respective utilities and will provide regulatory rate proceeding services.

City of Lawrence, Indiana

Water and sewer cost-of-service studies

Andre served as the engagement principal for the City of Lawrence, Indiana, (City) a municipal water and sewer provider. Baker Tilly prepared water and sewer cost-of-services for the City to address increases in operation costs and needed investment in capital infrastructure. The City was negotiating with the U.S. EPA on a corrective action plan (CAP) to address sanitary sewer overflows (SSOs) that would entail a list of significant capital improvements. The sewer utility provides sewage collection and conveyance services. Sewer treatment and disposal are provided by Citizens Energy Group (CEG) through a wholesale contract and volumetric wholesale rate. The cost-of-service studies also implemented rate structures to address customer affordability through the implementation of a customer assistance program for the city's low-income users.

City of St. Paul, Minnesota

Sewer and stormwater cost-of-service studies and rate model

Andre served as the engagement principal to assist the City of St. Paul, Minnesota (City). The City engaged Baker Tilly during 2023 to 2025 provide multiple iterations and alternatives of cost-of-service studies and rate models for the sewer and stormwater utility. The City provides sewage and drainage collection and conveyance services to customers within its service area. The City does not own or operate a treatment and disposal facility. Treatment and disposal are provided by Metropolitan Council's Environmental Services division (MCES). The City is billed by MCES based on its proportionate share of wastewater volume to annual costs (as of 2023 the City was the 2nd largest customer). Baker Tilly worked with City management to determine their pricing objectives. The reports addressed increases in operational expenses, MCES charges, cost-sharing with the City and a long-term capital plan. The report and results focused on addressing these needs while also assuring the City maintains its "AAA" rating on its sewer system.

City of Muncie, Indiana

Sewer cost-of-service study, CSO LTCP services and financings

Andre served as the engagement principal for several engagements to conduct cost-of-service studies for the City of Muncie's (City) sewer utility. In 2024 and 2025 the City engaged with Baker Tilly to develop a cost-of-service study for the sewer utility. The reports focused on the cost of operations, capital needs, other applicable revenue requirements and the proper allocation of revenue requirements between the city's larger customers, the residential customer class and contract customers. Baker Tilly conducted several executive sessions with management and the board to determine the pricing objectives and considerations for the contract customers. Baker Tilly prepared a financial plan, revenue requirements and suggested restructuring the rate structure from a flow rate for each customer class with a universal minimum charge regardless of customer class. The new rate structure expanded the types of customer

classes with a flow charge plus a base charge by customer class. The City also provides wholesale treatment service based on contracts and those cost allocation methodologies were not changed and included in the cost-of-service. The City was in negotiations with the Indiana Department of Environmental Management (IDEM), the state level agency that enforces compliance with the Clean Water Act, regarding the City's Agreed Order to address combined sewer overflows (CSOs) and the Clean Water Act.

The City engaged with Baker Tilly to provide rate consultation, modeling and negotiation services for the CSO LTCP. Andre served as engagement principal for this on-going engagement.

Finally, Baker Tilly has been engaged with the City for over 20 years to serve as municipal advisor on utility financings to raise funds for capital projects or refundings for savings.

Village of Elburn, Illinois

Water rate study, system development charge study

Andre served as the engagement principal for Baker Tilly's engagement for a water rate study and system development charge study for the Village of Elburn, Illinois (Village). The project includes developing a financial plan over a 20-year period, revenue requirements, determining future water rates and charges to address increasing operational costs, necessary future capital needs and potential growth in the system based on information from the consulting engineer. Baker Tilly developed multiple alternatives to present impacts of funding the capital plan with rate funded or a mix of rate funded and long-term financings. Alternatives also included various timing of major capital improvements. Baker Tilly determined that the current rate structure did not need to be revised as of now. Baker Tilly updated the water system development charge and discussed several alternatives with Village management.

City of Bettendorf, Iowa

Sewer rate study (in progress)

Andre is serving as the engagement principal for Baker Tilly's engagement for a sewer rate study for the City of Bettendorf, Iowa (City). The project includes developing revenue requirements and a financial plan, determining future sewer rates to address increasing operational costs, necessary future capital needs and the potential for annexation and development of special sewer user rates for a new service area. The City provides sewage collection and conveyance services to customers within its service area. The City does not own or operate a treatment and disposal facility. Treatment and disposal are provided by the City of Davenport, Iowa's wastewater treatment plant (DWWTP). The City is billed by DWWTP based on its proportionate share of operations, debt and capital.

Village of Woodstock, Illinois

Water and sewer cost-of-service studies (in progress)

Andre is serving as the engagement principal for Baker Tilly's engagement for cost-of-service studies for the Village of Woodstock (Village) water and sewer utilities. Baker Tilly is working with the Village to allocate costs between the water and sewer utilities and to cost activity centers to the respective utilities to determine cost-of-service for the various customer classifications. The project includes developing revenue requirements and a financial plan, determining future rates and charges to address increasing operational costs, necessary future capital needs. In working with the City to determine its pricing objectives. The rates should address revenue stability, fairness and equity and are legally defensible. Baker Tilly, through industry established rate design, developed alternative rate structures for Village management to consider.

Port County, Indiana

Establishment of a stormwater district

Andre served as the project manager for Porter County, Indiana in the establishment of a stormwater district and the development of rates and charges based on equivalent runoff units. Porter County, Indiana operates a Department of Development and Storm Water Management to serve parcels in the county (unincorporated areas). The rates were designed to be billed on the annual property tax bill and are used to provide funding for operational costs and necessary infrastructure upgrades to improve water quality, reduce flood damage and restore and enhance the natural drainage system.

DIRECTOR

Mitchell D. Eschweiler, CPA, MA

Mitchell Eschweiler is a director with Baker Tilly.



Baker Tilly Advisory Group, LP

9229 Delegates Row
Indianapolis, IN 46240
United States

T: +1 (317) 465 1555

mitchell.eschweiler@bakertilly.com

bakertilly.com

Years with Baker Tilly: 11

Education

Master of Science in accounting
Indiana University, Kelly School of
Business

Bachelor of Science in business
Indiana University, Kelly School of
Business

Project role

Mitchell will serve as project manager and lead the overall engagement and ensure the project achieves the desired scope and budget while also meeting all expectations of the City. Mitchell will serve as the main point of contact for the project. In addition, Mitchell will provide oversight of the quality and accuracy of key deliverables,

Profile

Starting with Baker Tilly in October 2014, Mitchell brings 10 plus years of experience serving municipal and not-for-profit utilities. His experience includes water, sewer, stormwater and electric utilities. Throughout his career he has assisted with across-the-board rate increases, cost-of-service studies, budgeting, long-range capital planning and aided with securing financing both through the open market as well as through state and federal programs.

Key project experience

- **City of Fort Wayne, Indiana** – water and sewer cost-of-service studies
- **City of Evansville, Indiana** – water and sewer cost-of-service, capital planning and financings
- **City of Basehor, Kansas** – sewer cost-of-service study
- **City of Lawrence, Indiana** – water and sewer cost-of-service studies
- **City of Saint Paul, Minnesota** – sewer and stormwater cost-of-service studies and rate model
-
- **City of East Chicago, Indiana** – water and sewer cost-of-service studies, stormwater rates
- **City of Bettendorf, Iowa** – sewer rate study (in progress)
- **Patoka Lake Regional Water and Sewer District, Indiana** – water and sewer rate studies
- **Town of Clarksville, Indiana** – Sewer and stormwater rate studies
- **Porter County, Indiana** – Establishment of stormwater district

Please see attachment for details about these projects.

DIRECTOR

Mitchell D. Eschweiler, CPA, MA

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Specific experience

- Assists in the issuance of debt to finance capital improvements or refinance existing debt for water, sewer, stormwater and electric utilities including open-market financings, state revolving loan fund (SRF) program financings and rural development financings
- Prepares rate studies for municipal utilities including across-the-board rate studies, cost-of-service rate studies and Indiana Utility Regulatory Commission ("IURC") rate cases
- Compilation of historical and prospective financials
- Comprehensive financial plans and long-range capital improvement plans
- Utility valuations
- Budget preparation for local governments

Industry involvement

- Indiana CPA Society (INCPAS)
- American Institute of Certified Public Accountants (AICPA)
- American Water Works Association (AWWA)
- Indiana Rural Water Association (IRWA)
- Alliance of Indiana Rural Water (AIRW)
- Indiana Water Environmental Association (IWEA)

Community involvement

- Indiana Water Environmental Associate (IWEA) Young Professional – Past Chair

Continuing professional education

- Certified Public Accountant (CPA) State of Indiana
- American Water Works Association – Rate Setting Essentials
- Registered Municipal Advisor with the Securities and Exchange Commission (SEC)
 - Series 50
 - Series 54

Mitchell D. Eschweiler, CPA, MA – Specific project involvement

City of Fort Wayne, Indiana

Water and sewer cost-of-service studies

Mitchell is serving as project manager for the City of Fort Wayne, Indiana (City), a large regional water and sewer system in northeast Indiana. In 2024, the City engaged Baker Tilly to prepare cost-of-service studies for both water and sewer utilities to address rising operational expenses and facilitate necessary investments in the city's water and sewer infrastructure. In addition, the cost-of-service studies included the development of water and sewer rates for the city's retail customers, wholesale water rates for the Town of Grabill and City of New Haven and contractual rates for its large tech and automotive customers. The rate structures developed in the cost-of-service reports also addressed differentials between the inside and outside City customer classes.

The City's water utility is regulated through the Indiana Utility Regulatory Commission (IURC). Once approved at the local level, the proposed cost-of-service is provided to the IURC for review and ultimate approval. As part of the proceeds for the water cost-of-service study with the IURC, Mitchell will provide support through the filing of testimony, a consultant's report, workpapers and exhibits and responses to data requests.

City of East Chicago, Indiana

Water, Sewer and Stormwater Cost-of-Service Studies

Mitchell served as the project manager for several engagements to conduct cost-of-service studies for the City of East Chicago's (City) water, sewer and stormwater utilities. In 2021 and 2022 the City engaged with Baker Tilly to develop cost-of-service studies for the sewer and water utilities, respectively. The reports focused on the cost of operations, capital needs, other applicable revenue requirements and the proper allocation of revenue requirements between the city's large industrial base and the residential customer class. Baker Tilly was also engaged to assist with the development of equitable stormwater rates that recovered revenues based on each customer classes impact on the stormwater system.

The City has also engaged Baker Tilly to serve as rate consultant in the City's respective rate proceedings before the Indiana Utility Regulatory Commission (IURC). Once the respective utility boards approve the updated rates and charges based on the cost-of-service studies. The final approval of a revised schedule of rates lies with the IURC. As rate consultant to the City, for the respective rate proceedings, Baker Tilly prepares an accounting report, written testimony, exhibits and workpapers as support for the revised schedule of rates. In addition, as rate consultant, works with the City's contracted legal counsel to advise on the City's other team members filed testimony and exhibits. As the rate proceeding moves forward Baker Tilly will provide assistance in reviewing the rate filing of the Office of Utility Consumer Counselor (OUCC), the rate payer's advocate, responses to OUCC discovery request, negotiations and testimony for a settlement with the OUCC and any intervenor in the proceeding.

Finally, Baker Tilly is currently engaged with the City for updated cost-of-service studies for the respective utilities and will provide regulatory rate proceeding services on both.

City of Evansville, Indiana

Water and sewer cost-of-service, capital planning and financings

Mitchell serves as the project manager for the City of Evansville, Indiana (City). He has prepared multiple cost-of-service studies for both the water utility and sewage works. Baker Tilly was engaged in 2016,

2022 and 2025, by the City, to perform a cost-of-service study for the sewage works and in 2025 for the water utility. The projects included the preparation of cost-of-service studies to address increasing operation costs and the need for significant capital investment due to the city's aging infrastructure and regulatory requirements. The City has on-going negotiations with the U.S. Environmental Protection Agency (EPA), U.S. Department of Justice (DOJ) and state regulators regarding a Consent Decree to address combined sewer overflows (CSOs) and the Clean Water Act. Baker Tilly developed a special flow rate by customer class, as part of this restructuring, to recover revenues to fund the capital program to address the CSOs (Long-Term Control Plan (LTCP)). Mitchell has also been integral in modeling and developing a long-range sewer rate model to fund the city's LTCP and provide support for negotiations with federal and state regulators. The goal of the model is to fund required consent decree projects, while also maintaining affordability for the sewer system users.

For the water utility, Mitchell has assisted with their regulated rates process through the Indiana Utility Regulatory Commission (IURC) in 2016, 2018 and 2021. These rate cases addressed increases in operation costs and the proposed issuance of debt to cover significant infrastructure improvements for the water utility's distribution system and water treatment plant.

Mitchell has also assisted the City with the issuance of revenue supported debt for the water utility and sewage works. Combined, he has assisted the city issue over \$500 million in revenue bonds to support water and sewer capital investments.

Finally, Mitchell meets with their project management team on a weekly basis to help assess and provide funding support for upcoming and future capital needs for the water utility and sewage works.

City of Basehor, Kansas

Sewer cost-of-service study

Mitchell served as the project manager for the City of Basehor, Kansas (City) a municipal sewer provider. Baker Tilly prepared a cost-of-service study for the city's sewer system to address increases in their operational costs and fund a multi-year capital improvement plan. Through the cost-of-service study, the City also wanted to implement a base charge to the sewer system's existing rate structure. The base charge, couple with the existing usage charge, would provide more revenue stability for the sewer system. The City's desired outcome for the report was to develop and implement a phased-in rate structure to address increases in operation costs and fund their future capital improvement plan.

City of Lawrence, Indiana

Water and sewer cost-of-service studies

Mitchell served as the project manager for the City of Lawrence, Indiana, (City) a municipal water and sewer provider. Baker Tilly prepared water and sewer cost-of-services for the City to address increases in operation costs and needed investment in capital infrastructure. The City was negotiating with the U.S. EPA on a corrective action plan (CAP) to address sanitary sewer overflows (SSOs) that would entail a list of significant capital improvements. The sewer utility provides sewage collection and conveyance services. Sewer treatment and disposal services are provided by Citizens Energy Group (CEG) through a wholesale contract and volumetric wholesale rate. The cost-of-service studies also implemented rate structures to address customer affordability through the implementation of a customer assistance program and low-volume user rate for the City's low-income users.

City of St. Paul, Minnesota

Sewer and stormwater rate study

Mitchell served as the project manager to assist the City of St. Paul, Minnesota (City). The City engaged Baker Tilly during 2023 to 2025 to provide multiple iterations and alternatives of cost-of-service studies

and rate models for the sewer and stormwater utility. The City provides sewage and drainage collection and conveyance services to customers within its service area. The City does not own or operate a treatment and disposal facility. Treatment and disposal are provided by Metropolitan Council's Environmental Services division (MCES). The City is billed by MCES based on its proportionate share of wastewater volume to annual costs (as of 2023 the City was the 2nd largest customer). Baker Tilly worked with City management to determine their pricing objectives. The reports addressed increases in operational expenses, MCES charges, cost-sharing with the City and a long-term capital plan. The report and results focused on addressing these needs while also assuring the City maintains its "AAA" rating on its sewer system.

City of Bettendorf, Iowa

Sewer rate study (in progress)

Mitchell is serving as the project manager for the sewer rate study for the City of Bettendorf, Iowa (City). The project includes developing future sewer rates to address increasing operational costs, necessary future capital needs and the potential for annexation and development of special user rates for a new service area. The City provides sewage collection and conveyance services to customers within its service area. The City does not own or operate a treatment and disposal facility. Treatment and disposal are provided by the City of Davenport, Iowa's wastewater treatment plant (DWWTP). The City is billed by DWWTP based on its proportionate share of operations, debt and capital.

Patoka Lake Regional Water and Sewer District, Indiana

Water and sewer rate studies

Mitchell has served as the project manager for the Patoka Lake Regional Water and Sewer District (District). The District, located in southern Indiana, provides water and treats wastewater for 11 southern Indiana counties. The service area encompasses over 100,000 people. In his 10 years of experience working with the District, Mitchell has prepared several water and sewer rate studies for the District to address increases in their operations and to support the issuance of debt to support capital infrastructure investments.

In 2023, Mitchell served as the project manager for the issuance of debt and calculation of a wholesale treatment rate and debt service surcharge for one of the sewage work's largest customers.

Town of Clarksville, Indiana

Sewer and stormwater rate study

Mitchell is serving as the project manager for the sewer and stormwater rate study for the Town of Clarksville (Town). The project includes developing a phase-in approach to the future sewer and stormwater rates. The increases are necessary to address increasing operational costs, necessary rate funded capital needs, implementation of a payment in lieu of taxes and the issuance of debt to fund capital improvements. Mitchell and his team are leading the Town through the rate process as well as the process for issuing revenue back debt on the open market.

Port County, Indiana

Establishment of a stormwater district

Mitchell assisted Porter County, Indiana in the establishment of a stormwater district and the development of rates and charges based on equivalent runoff units. Porter County, Indiana operates a Department of Development and Storm Water Management to serve parcels in the county (unincorporated areas). The rates were designed to be billed on the annual property tax bill and are used to provide funding for operational costs and necessary infrastructure upgrades to improve water quality, reduce flood damage and restore and enhance the natural drainage system.

MANAGER

Courtney Holliday, CPA, MA

Courtney Holliday is a manager with Baker Tilly.



Baker Tilly Advisory Group, LP

9229 Delegates Row
Indianapolis, IN 46240
United States

T: +1 (317) 465 1747
courtney.holliday@bakertilly.com

bakertilly.com

Years with Baker Tilly: 6

Education

Master of Professional Accounting
Bachelor of Science
Butler University

Project role

Courtney will serve as assistant project manager and will help with overall engagement to ensure the project achieves the desired scope and budget while also meeting all expectations of the City. Courtney will serve as one of the main points of contact for the project.

Profile

Starting with Baker Tilly in August 2019, Courtney brings 5 plus years of experience serving municipal and not-for-profit utilities. Her experience includes water, sewer, stormwater and electric utilities. Throughout her career she has assisted with across-the-board rate increases, cost-of-service studies, budgeting, long-range capital planning and aided with securing financing both through the open market as well as through state and federal programs.

Key project experience

- **City of Columbus, Indiana** – water and sewer cost-of-service studies and financings
- **City of Jeffersonville, Indiana** – sewer rate studies and financings
- **City of Peru, Indiana** – electric cost-of-service study
- **City of Virginia, Minnesota** – sewer and stormwater rate studies
- **Community Utilities of Pennsylvania, Inc.** – water and sewer cost-of-service studies

Please see attachment for details about these projects.

MANAGER

Courtney Holliday, CPA, MA

Page 2

Specific experience

- Assists in the issuance of debt to finance capital improvements or refinance existing debt for water, sewer, stormwater and electric utilities including open-market financings, state revolving loan fund (SRF) program financings and rural development financings
- Prepares rate studies for municipal utilities including across-the-board rate studies, cost-of-service rate studies and Indiana Utility Regulatory Commission ("IURC") rate cases
- Provides asset management and capital project planning for utilities
- Compilation of historical and prospective financials
- Comprehensive financial plans and long-range capital improvement plans

Industry involvement

- American Institute of Certified Public Accountants (AICPA)

Community involvement

- Indiana Water Environmental Associate (IWEA) Utility Management Committee, committee member
- Indiana Women in Public Finance, Indiana chapter, board member

Continuing professional education

- Certified Public Accountant (CPA) State of Indiana
- Registered Municipal Advisor with the Securities and Exchange Commission (SEC)
 - Series 50

Courtney Holliday, CPA, MA – Specific project involvement

City of Columbus, Indiana

Water and Sewer Cost-of-Service Studies and Financings

Courtney served as the project manager to conduct cost-of-service studies for the City of Columbus (City) water and sewer utilities. Since 2020, the City has engaged with Baker Tilly to develop two cost-of-service studies (four total) for each water and sewer utility. The reports focus on the cost of operations, capital needs, other applicable revenue requirements and the proper allocation of revenue requirements between the City's large industrial base and the residential customer class. Baker Tilly also assisted with negotiations between wholesale customer contracts.

The water utility is regulated, therefore the City has also engaged Baker Tilly to serve as rate consultant in the City's rate proceedings before the Indiana Utility Regulatory Commission (IURC). The utility board approved the updated rates and charges based on the cost-of-service studies, however, the final approval of a revised schedule of rates lies with the IURC. As rate consultant to the City, Baker Tilly prepares an accounting report, written testimony, exhibits and workpapers as support for the revised schedule of rates. In addition, Baker Tilly works with the City's contracted legal counsel to coordinate with all working group parties filed testimony and exhibits. As the rate proceeding moves forward Baker Tilly will provide assistance in reviewing the rate filing of the Office of Utility Consumer Counselor (OUCC), the rate payer's advocate, responses to OUCC discovery request, negotiations and testimony for a settlement with the OUCC and any intervenor in the proceeding.

As part of the cost-of-service studies, proposed financings were incorporated into the proposed rate increases for both utilities. Once the rates are settled on for water and approved by the utility board for sewer, Baker Tilly helps work through the financings. The most recent financings have occurred through the Indiana Finance Authority State Revolving Fund loan program. However, Baker Tilly has also utilized the open market and helped the City obtain credit ratings through S&P. Baker Tilly is tasked with preparing necessary offering documentation by a determined timeline to obtain favorable financings for the City.

City of Jeffersonville, Indiana

Sewer Rate Studies and Financings

In 2020, the City of Jeffersonville (City) asked Baker Tilly to prepare a sewer rate analysis. During that time, the City was working on ratifying their consent decree that had previously been agreed upon with the Environmental Protection Agency (EPA) and the Indiana Department of Environmental Management (IDEM). The consent decree was prepared in order to address the City's combined sanitary sewer system and propose a plan to address the remaining required projects to be completed over the next several years. Baker Tilly was tasked with preparing a report that analyzed current cash balances and created alternatives of how to fund over \$100 million in the next five years with different financing alternatives and assumed levels of sewer rate increases. This report has been through several iterations as Baker Tilly has worked closely with the City as priorities change.

Baker Tilly has also completed several revenue backed financings, new money and refunding, for the City mostly through the open market. The City obtained credit ratings and received favorable financing terms.

Most recently, Baker Tilly was tasked with analyzing their current tap fee charged to new users of the system. The City was able to increase the tap fee, through council approval, to supplement this fund of dollars that can be used on future expansionary projects to help lessen potential sewer rate increases. Baker Tilly also analyzed the City's surcharge to outside of city customers and made recommendations regarding the additional costs it takes to serve customers outside city limits.

City of Peru, Indiana

Electric Cost-of-Service Study

During 2022, Baker Tilly was tasked with preparing a cost-of-service-study for the City of Peru (City) electric utility. This involved analyzing current historical data and incorporating known adjustments to operating expenses as well as a 5-year estimated capital improvements plan to determine future revenue requirements.

The study then took test year billings and load information by eight different customer types to determine certain peak and demand characteristics by group to create allocation methods for each customer class. From there, certain revenue requirements were allocated to each customer class based on the different allocation methods to determine a fair value rate base and rate of return by customer class. Baker Tilly worked through multiple draft versions of the report, including modeling what phasing in the rate increases would look like, to find the best solution for the City that had the smallest impact on the customers.

City of Virginia, Minnesota

Sewer and Stormwater Rate Studies

Baker Tilly was contracted in 2024 to assist the City of Virginia (City) with sewer and stormwater rate analyses. The sewer rate study entailed analyzing current financial information, current outstanding general obligation debt and determining estimated costs to recover through user charges. Two alternatives were presented based on incorporating a proposed financing to cover a capital project or funding with cash on hand over time.

An analysis of the stormwater rate was also completed. This involved calculating current equivalent billing units and allocating estimated costs per equivalent billing unit to determine a monthly stormwater rate. Baker Tilly also prepared an analysis comparing rates of other similarly sized Minnesota stormwater utilities to help the council be better informed to make a decision that will best situate the utility and benefit their ratepayers.

Community Utilities of Pennsylvania, Inc.

Water and Sewer Cost-of-Service Studies

Baker Tilly was contacted by Community Utilities of Pennsylvania (CUPA) to complete water and sewer cost-of-service studies. In this case, CUPA provided revenue requirements to Baker Tilly, so Baker Tilly was only tasked with analyzing test year billing data and properly allocating revenue requirements between the different entities that fall within CUPA. A low-income rate was also developed by Baker Tilly.

CUPA also engaged Baker Tilly to serve as rate consultant in the rate proceedings before the Pennsylvania Office of Consumer Advocate (OCA). As rate consultant, Baker Tilly prepared an accounting report, written testimony, exhibits and workpapers as support for the revised schedule of rates. In addition, Baker Tilly worked with legal counsel to coordinate with all working group parties. As the rate proceeding moved forward, Baker Tilly provided assistance in reviewing the rate filing, responses to discovery request, negotiations and testimony for a rate settlement.

PRINCIPAL

Elizabeth Bergman

Elizabeth Bergman is a principal with Baker Tilly Municipal Advisors, LLC.



Baker Tilly Municipal Advisors, LLC

30 E Seventh St
Suite 3025
St. Paul, MN 55101
United States

T: +1 (651) 223 3018
elizabeth.bergman@bakertilly.com

bakertilly.com

Education

Master of Public Administration
Columbia University
(New York, New York)

Bachelor of Arts in political science
University of Minnesota-
Minneapolis

Registered municipal advisor
representative

Elizabeth serves as principal with Baker Tilly's Municipal Advisory practice, providing strategic guidance to local governments, utilities, and colleges and universities across the Midwest. In her role, she provides independent, fiduciary guidance on the planning, structuring and executing public finance transactions to help clients achieve their infrastructure and economic development goals.

Elizabeth supports clients through every stage of the financing process—from evaluating funding to developing investor outreach strategies and overseeing debt issuance.

Highlights from her municipal advising career include leading debt financing efforts of more than \$400 million for transit expansion in the Twin Cities metropolitan area; advising on series of economic development projects financed through unrated sales tax and revenue (STAR) bonds; and serving as lead municipal advisor on more than \$1 billion of higher education transactions.

With more than two decades of experience in public finance, Elizabeth spent the first half of her career as a rating analyst at a leading global credit rating agency in New York and London. During her tenure, she chaired credit committees and authored several methodologies. Today, she leverages that experience advising many of BTMA's high-profile clients on rating strategies. Her work includes developing internal rating models, crafting high impact rating presentations and delivering internal credit training. She has successfully guided numerous clients through the initial rating process and supported many in achieving credit upgrades.

Elizabeth's public finance expertise spans a wide range of sectors, including utilities, economic development, higher education, student loans, transit, healthcare, housing, structured products and European municipal bonds.

Specific experience

- Deep knowledge of Minnesota financing tools, including less frequently used such as grant anticipation notes and sales tax revenue bonds
- Well versed in higher education finance with experience in private placements and public sales with more than \$1 billion financed
- Experienced in economic development financing, including serving as lead municipal advisor on unrated development financing
- Credit rating expert advising high profile clients on rating strategies and leads development of internal credit model, presentations and training
- Published numerous in-depth analytical reports and developed several credit methodologies

PRINCIPAL

Elizabeth Bergman

Page 2

Specific experience, (cont.)

- Analyst for the New York City Office of Management and Budget
- Admission counselor at the University of Minnesota

Industry involvement

- Minnesota Government Finance Officers Association
- Minnesota Institute of Public Finance, board member
- Government Finance Officers Association (GFOA)
- Women in Public Finance (WPF)
- National Federation of Municipal Analysts (NMFA)

DIRECTOR

Christine M. Hogan

Christine Hogan is a director with Baker Tilly Municipal Advisors, LLC.



Baker Tilly Municipal Advisors, LLC

30 E Seventh St
Suite 3025
St. Paul, MN 55101
United States

T: +1 (651) 223 3034
chris.hogan@bakertilly.com

bakertilly.com

Education

Bachelor of Arts in business
administration
University of St. Thomas
(Saint Paul, Minnesota)

Registered municipal advisor
representative

Christine is responsible for all aspects of debt issuance including structuring debt, reviewing financing options, developing recommendations detailing financing plans, reviewing legal documents, and personally assisting clients for the Minnesota, Kansas, Missouri and Wisconsin teams. She has extensive knowledge of various types of financing including economic development, sales tax and special tax-back financing, general obligation and utility revenue.

Specific experience

- Works with various public sector clients in developing and executing long-term debt management strategies
- Assists clients with debt structuring; including debt modeling based on current and future financing plans
- Actively involved in working with clients on restructuring of existing debt including identifying potential cost savings
- Produces tax impacts
- Develops formal recommendations to be presented to the governing body as it relates to debt issuance
- Assists with developing individualized financial plans to meet clients' financing needs
- Knowledge of state and federal regulations as it pertains to the issuance of debt
- Provides analytics to assist with the credit rating process as it relates to a client's issuance of debt

OCTOBER 10, 2025

PROPOSAL TO PROVIDE A STORM WATER UTILITY RATE STUDY FOR:

The City of Wyoming, Minnesota



Ehlers
3001 Broadway Street NE, Suite 320
Minneapolis, MN 55413

Municipal Advisor Registration Number: K0165
SEC CIK Number: 0001604197

ehlers-inc.com

EHLERS' ADVISORS:

Todd Hagen

Senior Municipal Advisor
thagen@ehlers-inc.com
651-697-8508

Kyle Sawyer

Director of Fiscal Consulting
ksawyer@ehlers-inc.com
651-697-8539

October 10, 2025

Robb Linwood, City Administrator
City of Wyoming
26885 Forest Blvd
Wyoming, MN 55092



Dear Robb,

Thank you for the opportunity to provide a proposal to undertake a Storm Water Utility Rate Study for the City of Wyoming. We understand the City wishes to review its storm water rates to ensure coverage of operating and maintenance costs, fund capital projects and establish adequate reserves. An Ehlers rate study will provide rate recommendations for the next 10 years. In addition, it will provide a preliminary financing plan for street and other capital projects to be funded with storm water revenues. Ehlers will provide the City with a solution that incorporates best practices for rate setting plus a strong financial planning perspective.

We believe the following factors set us apart from competing firms:

Our Approach. We understand the multiple interests the City must balance when setting rates. Our specialists have city finance experience and approach the study from the perspective of minimizing impacts to residents, maximizing the health and flexibility of the fund and providing ease of administration and communication to the public.

Our Promise. The primary goal of a rate study is to provide just and equitable storm water rates balanced with a long-term financial plan for the utility's operations, capital needs and required reserves. Our proposed study will provide a platform to confidently make rate-setting decisions.

You should expect your consultant to evaluate the full range of options and help the City implement rates that meet your objectives. **We propose to provide ongoing dialogue and idea-sharing, independent analysis, presentation of customized options for your unique circumstances and a competitive, value-oriented fee structure.**

Respectfully submitted,

A handwritten signature in blue ink, appearing to read 'Todd Hagen'.

Todd Hagen
Senior Municipal Advisor
thagen@ehlers-inc.com
651-697-8508

Ehlers
3001 Broadway Street NE, Suite 320
Minneapolis, MN 55413
651-697-8555 (fax)

A handwritten signature in blue ink, appearing to read 'Kyle Sawyer'.

Kyle Sawyer
Director of Fiscal Consulting
ksawyer@ehlers-inc.com
651-697-8539

Ehlers
3001 Broadway Street NE, Suite 320
Minneapolis, MN 55413
651-697-8555 (fax)

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Consultant Qualifications/Profile

Ehlers has extensive experience conducting utility rate studies across Minnesota. We assist cities to develop storm water rates that work for their community and address their unique needs. **Over the past five years we have completed more than 150 utility rate studies.**

Experience with Storm Water Rate Studies

While Ehlers has completed storm water utility rate studies all across Minnesota, We have selected the following three case studies to illustrate the work done by the personnel who will be assigned to the Wyoming engagement.

The City of Brookings, South Dakota: Storm Water Utility Rate Study

In 2022, the City of Brookings, South Dakota embarked on a capital improvement plan that included significant new storm water costs. Based on Ehlers' prior financial planning work with the City, we determined that the existing storm water fee revenue would not be sufficient to pay for the planned improvements. We further learned from City staff that the current fee structure was time-intensive to administer with the area of each single family property needing to be individually calculated and charged. The City needed alternatives to restructure the storm water fee and elected to conduct a storm water utility rate study.

The City indicated it wanted to transition to an Equivalent Residential Unit ("ERU") system for calculating storm water rates. Under this system, most single-family properties are considered one ERU, regardless of lot size, and pay the same storm water rate. For other property types, each property was assigned an equivalent number of ERUs based on their impervious surface area. The consulting engineer determined the median size and impervious surface of a single-family lot and assigned ERU values to other lots based on a fly-over measure of impervious surface. Ehlers leveraged this data to create a parcel-by-parcel listing of storm water rates, along with a revenue model to determine the ERU rate and monthly charge for each non-residential parcel within the City. The ERU rate was established to meet the revenue requirement determined in the cashflow projection for the storm water fund.

The result was a financial plan for the long-term funding of storm water projects along with a database of parcels for ease of implementation. We reviewed various options with the storm water committee and created "buy-in" on the ERU system.

Reference Contact:

Charlie Richter | City Engineer | 605-692-6281 | crichter@cityofbrookings-sd.gov

The City of Coon Rapids, Minnesota: Storm Water Utility Rate Study

The City of Coon Rapids was anticipating substantial increases in the costs of future capital projects to meet storm water infrastructure needs and engaged Ehlers to develop an actionable funding plan to pay for those improvements with storm water revenues. As part of that work, we also evaluated the City's storm water rate structure and rates. Like Wyoming, Coon Rapids uses Utility Factors but wanted to adjust the factors to reflect increasing density of development and inequity between customer classes. In addition, billing practices weren't conforming to the City's rate ordinance. Ehlers provided rate options using the Utility Factors methodology. The recommended rate option increased equity between customer classes while minimizing administratively burdensome or disruptive changes to billing practices.

Reference Contact:

Ashley Hansen | Finance Director | 763-767-6443 | AHansen@coonrapidsmn.gov

The City of Pipestone, Minnesota: Storm Water Utility Rate Study

Prior to working with Ehlers, the City of Pipestone had a simple storm water rate structure that charged by property use and whether the property fell into a "small" or "large" category. As a result, single family property owners were paying more than their equitable share of the storm water costs and large industrial properties were being underbilled. Ehlers explored a range of rate structure options with the City and vetted each one for administrative ease, engineering costs to establish and maintain the system, complexity for ratepayers, and equity between rate payers. After a thorough analysis, the City opted to transition to a Utility Factor methodology. Ehlers guided Pipestone's City Council through the rate setting process, worked with the city attorney to craft the new storm water rate ordinance, and assisted staff in fielding implementation questions. Please refer to **Appendix A** for a copy of one of the Council presentations Ehlers prepared for this project.

Reference Contact:

Deb Nelson | City Administrator | 507-825-3324 | dnelson@cityofpipestone.com

Key Personnel

Ehlers offers a team of experienced advisors and consultants to deliver a high quality, accurate rate study that will address the City's financial and policy concerns. The lead client service contact will be Todd Hagen who will oversee the project and develop the financing plan. He will be assisted by Megan Sandell and Kristina Norquist. Megan will complete the analysis and draft the report, while Kristina will refine the report and provide quality assurance.



Todd Hagen
Senior Municipal Advisor

Todd has been with Ehlers since 2001, working with our Minnesota Municipal Finance team. He has 30+ years of experience financing local government infrastructure and facilities, including municipal buildings, public works and public safety facilities, public utilities, equipment and roads. Todd's expertise goes far beyond debt issuance – extending to a wide range of finance needs such as: measuring the tax impact of projects, completing utility rate studies, financial management plans, capital improvement plans and analyzing the feasibility of projects.



Megan Sandell
Fiscal Consultant

Megan supports local governments in Minnesota through long-term financial planning and development financing. Her planning and administrative work with tax increment financing helps communities maximize their resources while complying with state law. Megan's career at Ehlers started in 2015 as Paying Agent Administrator and Bond Sale Coordinator. Previously, Megan worked in the Fixed Income Sales and Trading Division of Piper Jaffray.



Kristina Norquist
Senior Fiscal Consultant

Kristina guides Minnesota and Wisconsin municipalities through long-term financial planning to meet their policy objectives. She brings special expertise in setting utility rates, capital planning and managing tax increment districts. Kristina began her career at Ehlers as an Arbitrage Consultant, preparing arbitrage reports and advising clients on post-issuance compliance. Prior to joining the firm in 2008, she was a senior accountant with a nationally recognized insurance company. Kristina's extensive understanding of financial management, utilities and property tax systems is invaluable to her clients.

Organizational Structure

All team members assigned to this project have the capacity available to complete the proposed work in a timely fashion. The organizational structure for this engagement is as follows:

PROJECT OVERSIGHT

Todd Hagen

Senior Municipal Advisor, Primary Contact
Project Oversight, Council Meetings

FISCAL CONSULTING

Megan Sandell

Fiscal Consultant
Financial Projections, Report Development

Kristina Norquist

Senior Fiscal Consultant
Report Refinement, Quality Assurance

Project Approach/Work Plan

Rate structures have an impact on several different aspects of the City's financial system, so we approach our studies and the potential impacts as follows:



We take complex data and modeling and break it down into a straight-forward format for the City Council to make informed decisions and to communicate the rates to the general public. We work as a team with staff and engineering consultants so all aspects of the storm water utility are considered and factored into the rates.

For the storm water fund, Ehlers proposes to complete a cashflow projection and long-term funding plan. We can also review billing data to evaluate alternative rate structures and measure the impact on revenues as an additional option for the City to consider.

The rate study will result in:

- » Recommendations for storm sewer rates through 2035
- » Recommendations for appropriate cash balances & a strategy for maintaining reserves
- » A funding plan for future capital projects
- » A flexible planning tool that helps the City respond to changing circumstances & assumptions about capital investments, funding options & shifts in customer usage & development patterns
- » An optional fee comparison to other cities

Please see our detailed workplan in [Appendix B](#).

Project Schedule & Cost

We recognize the City's preferred timeline is to present the study to the City Council on November 18th. We are providing our best estimate of a timeline for completion and are open to further conversations with the City on an adjusted, mutually agreed timeline.

Step	Activity	Responsible Party	Estimated Completion	Estimated Hours	Estimated Cost
1	Notice to proceed issued by City	City	October 22, 2025	N/A	N/A
2	Discuss the City's objectives for the study	City & Ehlers	October 23, 2025	2	\$590
3	Data request made by Ehlers	Megan Sandell	October 24, 2025	1	\$295
4	City provides requested data	City	October 31, 2025	N/A	N/A
5	Review City's capital improvement plan	Megan Sandell	November 3, 2025	2	\$590
6	Draft cash flow analysis identifying appropriate reserve amounts and revenue requirements	Megan Sandell	November 18, 2025	10	\$2,950
7	Quality assurance	Kristina Norquist	November 25, 2025	2	\$590
8	Meeting with City to review draft analysis	City & Ehlers	December 1, 2025	2	\$590
9 (Optional)	Revise the existing rate structure to meet the City's goals	Megan Sandell & Kristina Norquist	December 29, 2025	16	\$4,720 (Optional)
10 (Optional)	Community comparison of utility rates	Megan Sandell	December 29, 2025	4	\$1,180 (Optional)
11	Final cash flow analysis incorporating City feedback from initial review meeting and draft report	Megan Sandell & Kristina Norquist	December 29, 2025	8	\$2,360
12	Meeting with City to review final analysis, draft report, and recommendations	City and Ehlers	January 5, 2026	2	\$590

Step	Activity	Responsible Party	Estimated Completion	Estimated Hours	Estimated Cost
13	Final report incorporating City feedback provided to City for review	Megan Sandell & Kristina Norquist	January 13, 2026	6	\$1,770
14	Reported presented to City Council	Todd Hagen & Megan Sandell	January 20, 2026	2	\$590

Ehlers will complete the scope of work at \$295 per hour with a not-to-exceed cost of \$10,915. We will invoice monthly for work completed in the prior month. Additionally, Ehlers can complete the optional work noted in the above table as follows:

- » Optional analysis of storm water rate structures: \$4,720
- » Optional community comparison of utility rates: \$1,180

SECTION I: EXCEPTIONS & DEVIATIONS

Exceptions & Deviations

Ehlers does not require any exceptions or deviations to the contract or the RFP requirements.

J: ADDITIONAL INFORMATION

Additional Information

Rate studies are a team effort. We will work with the City to obtain the following information. Ehlers has already obtained some of this information from the City's website.

- » 5 – 10 year Capital Improvement Plan for all Utilities
- » If we look at changing storm water rate structures (optional) we will need detailed usage data for a 12-month period for the storm water utility in Excel if available. Data should include:
 - » Account numbers, customer name, customer type & acreage (if applicable)
 - » Amount charged by customer by billing period
- » Projected growth estimates for the next 10 years
- » Financial statements for 2022, 2023, & 2024
- » 2025 budget & YTD financial statements
- » 2026 budget
- » Debt repayment schedules for all existing debt supported by the storm water funds, or that the City wishes to be supported by the storm water fund going forward

H: PROJECT COST

- » Current year fee schedule
- » City ordinances pertaining to storm water rate-setting
- » A copy of the last completed user rate study, if applicable
- » Other information as necessary

SECTION K: REFERENCES

References

We invite you to contact the references listed in [section C](#).



City of Pipestone

Storm Sewer Rate Study

June 28, 2023

1

Current Rate Structure

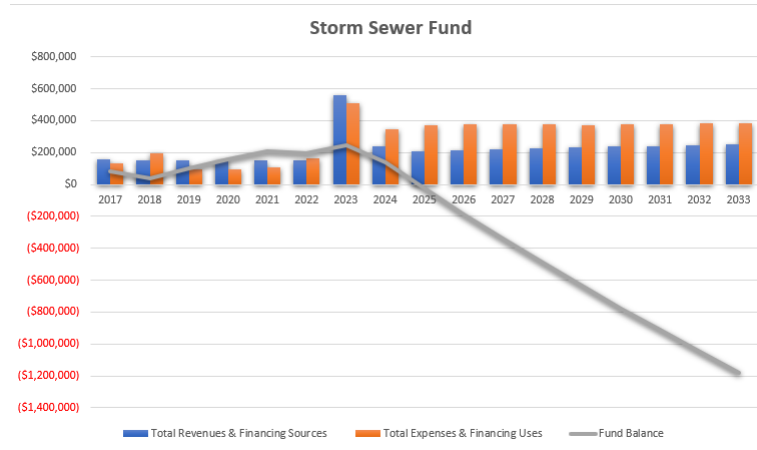
Property Class	Monthly Rate
Residential (<25,000 sq ft)	\$5.50
Large Residential (>25,000 sq ft)	\$7.00
Commercial	\$13.00
Large Commercial	\$16.00



2

2

Current Fund Balance Projection



Assumes 3% annual rate increases

3

3

Capital Improvement Plan

Improvement	Year	Amount
Equipment	Annually	\$10,000
Nichols' and Sanfords' Addition Phase 3	2024	\$267,200
Placeholder	2025	\$250,000
Placeholder	2026	\$250,000
Placeholder	2028	\$250,000
Placeholder	2030	\$250,000
Placeholder	2032	\$250,000



4

4

Options to Generate More Revenue

Option #1: Apply a percentage increase to existing rates

- Or -

Option #2: Explore new rate structure to increase equity between customer classes



.16 Acres
\$5.50



5.17 Acres
\$16.00



5

5

Proposed Rate Design

Residential Equivalency Factor (REF) x Acreage x Fee

- Most common rate design
- Balances equity with ease of administration
- Single-Family Homes and Duplexes are billed the fixed monthly fee

Proposed Fee = \$10.00 per month



6

6

Proposed Rate Structure

Property Class	Proposed Monthly Rate
Residential	\$10.00
All other developed parcels	$\$10.00 \times \text{REF} \times \text{Acreage}$ (Up to \$100 maximum charge)



7

7

REFs for Property Classes Other Than Single Family Homes and Duplexes

PROPERTY CLASS	REF
Agricultural/Undeveloped	0.00
School	1.70
Multifamily	1.80
Institutional	1.80
Commercial	1.90
Industrial	1.90



8

8

Rate Design

- Undeveloped properties will not pay a storm sewer fee
 - ✓ Vacant lots
 - ✓ Agriculturally zoned property
- City-owned property will not pay fee
- Minimum storm sewer fee of \$17.50 for all non-residential parcels
- Maximum fee will be \$100 per month per parcel



9

9

Sample Storm Sewer Bills – Commercial

Property	Acreage	Current Fee	2024 Proposed Fee	\$ Monthly Increase
Mark's Electric	.07 Acres	\$13.00	\$17.50	\$4.50
Windy Ridge Vet Clinic	1.94 Acres	\$5.50	\$36.87	\$31.37
Coborn's Inc	4.14 Acres	\$16.00	\$78.58	\$62.58
S & S Truck Repair	5.17 Acres	\$16.00	\$98.31	\$82.31



10

10

Future Rates and Revenue

Assumes \$250,000 in additional street projects in 2025, 2026, 2028, 2030, and 2032

Residential Storm Fees					
	2024	2025	2026	2027	2028
Monthly Rate	\$ 10.00	\$ 10.60	\$ 11.24	\$ 11.91	\$ 12.62
Yearly Revenue	\$ 294,136	\$ 311,784	\$ 330,491	\$ 350,321	\$ 371,340



11

11

What if We Kept the Current Rate Structure?

Property Class	Current Monthly Rate	2024 Proposed Monthly Rate
Residential (<25,000 sq ft)	\$5.50	\$10.70
Large Residential (>25,000 sq ft)	\$7.00	\$13.62
Commercial	\$13.00	\$25.29
Large Commercial	\$16.00	\$31.12



12

12

Rate Structure Comparison for Residential Customers

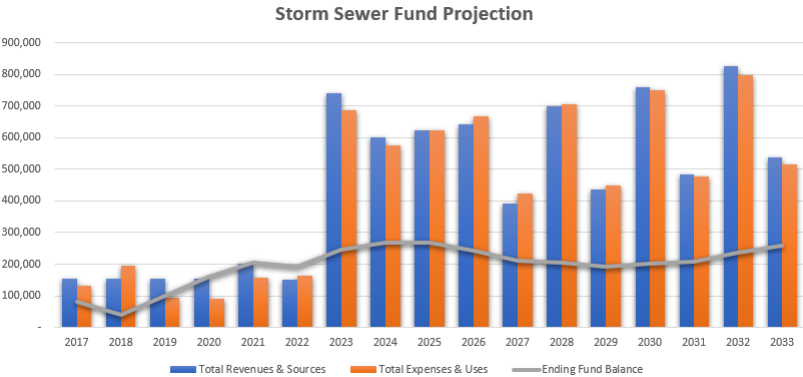
Residential Storm Fees									
	2024		2025		2026		2027		2028
New REF Structure	\$	10.00	\$	10.60	\$	11.24	\$	11.91	\$ 12.62
Current Structure	\$	10.70	\$	11.34	\$	12.02	\$	12.74	\$ 13.51
% Difference		7%		7%		7%		7%	7%



13

13

Storm Sewer Fund Balance Projection with Rate Increase



14

14

Next Steps

- Council discussion and feedback
- 1st reading of new rate ordinance
- 2nd reading and adoption of new rate ordinance
- Implementation for 2024



15

15



16

16

Work Plan for the Storm Water Utility Rate Study

The following workplan adheres to the project schedule shown in section G/H to the extent there is a specific decision point and/or deliverable.

Task	Decision Points	Deliverables	RFP Tasks
Discuss the City's objectives for the study		An initial meeting with staff to ensure that we fully understand the utility's financial situation, including outstanding and planned debt issuance, the City's short and long-term goals, political concerns, administrative concerns and future estimates of new commercial and residential growth.	
Gather data from City staff		For a listing of materials to be provided by the City, please see section J .	1
Review the City's Capital Improvement Plan	Staff review will verify CIP to ensure its accurate and complete.	We will use information from City staff and consulting engineers to compile a detailed Capital Improvement Plan for the storm sewer utility. We will ensure all related costs, including equipment, vehicles, road reconstruction and capital improvement projects, are included in the Capital Improvement Plan.	4

Task	Decision Points	Deliverables	RFP Tasks
Complete rate study & financial plan	We will provide up to two options for storm water rates for residential and commercial customers. Staff will provide feedback on which options should be finalized for Council consideration.	Ehlers will create a cash flow projection for the storm water fund showing projected revenues and total expenses, including operations and maintenance costs, depreciation, department servicing, net operating income, capital improvements, and debt to test adequacy of existing and proposed rates. Ehlers will review existing utility rates and user charges to determine if the rates and charges are sufficient to pay for operations and capital improvements.	1, 2, 3, 4, 5, 6, 7, 12, 13, 14, 15
Revise existing rate structure to meet the City's goals	If the City desires to revisit its storm water rate structure, we will recommend changes (if necessary) so the amount of revenue generated by each user class is proportionate to its demands for storm water treatment.	Up to two options for new storm water rate structures. Each scenario will be “revenue neutral,” meaning each will generate the same amount of revenue but may vary between customer classes. We will also provide sample storm water bills for various property types.	14

Task	Decision Points	Deliverables	RFP Tasks
Identify appropriate reserve amounts & financing needs, if any		We will recommend target cash reserves and graphically represent the projected cashflow vs. the target cashflow. Proposed bonding, if any, will be built into the cashflow projection.	16
Quality Assurance		The rate study will undergo a formal quality control review by a Senior Financial Specialist at Ehlers who specializes in rate studies.	
Provide a comparison of utility rates in similar communities	We will seek staff direction on the communities the City would like to use for comparison.	The survey will compare utility fees charged for a single-family home in Wyoming with fees charged by up to five comparable and/or neighboring communities. Ehlers will provide a graphic representation of a Wyoming resident's current and proposed storm water bill along with up to five comparison communities' sample bills.	23

Task	Decision Points	Deliverables	RFP Tasks
Recommendations	Staff direction on proposed recommendations.	The rate analysis will provide up to two options for storm water rates. The options may vary in the timing of capital improvements, differing rate structures or alternative funding sources, depending on what the City wants to explore. Recommendations will be presented prior to drafting the report.	17, 18
Presentation to Council & the Community	Council policy direction	The rate analysis will include one presentation at City Council workshops or meetings with either a Power Point summary or written report of the work completed and recommendations. The presentation will synthesize the rate study into easy-to-understand graphics and talking points.	19

As Ehlers receives direction from staff and Council, our methods will adjust as needed. We will respond to the City’s priorities and concerns without incurring unnecessary steps or cost.

Please note that Tasks #8, #9, #10 and #11 in the Request for Proposal pertain to water rate studies and are not addressed in our work plan as they are not applicable to storm water.



Proposal
City of Wyoming, Minnesota
Stormwater Utility Rate Study
October 10, 2025

Erickson Northstar, L.L.C



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October 10, 2025
Robb Linwood
City Administrator
P.O. Box 188
26885 Forest Blvd.
Wyoming, MN 55092

RE: Proposal for a Stormwater Utility Rate Study

Dear Robb:

Enclosed please find the Erickson Northstar, L.L.C/WSB response to the City of Wyoming's Request for Proposal (RFP) for a Stormwater Utility Rate Study. We have prepared this proposal based on our understanding of the scope from the City's RFP and our extensive experience in developing utility rates, fees and charges for local governments. Our team will work closely with the City to develop a compelling business case for the City's stormwater rates based on the application of proven best practices and a sophisticated appreciation for the unique challenges local governments face in the current environment. The enclosed proposal response demonstrates that the combined partnership of Erickson Northstar, L.L.C. and WSB possesses the expertise and capability to assist Wyoming with this important project

As you review our proposal, we would ask you to consider the qualifications, experience, and value we can bring to this project:

1. The consultants who will work on this project have established themselves as experts in assisting local government with utility rate studies. Their experience blends local knowledge with a national perspective.
2. The consultants will bring their significant local government experience to this project helping the City identify new approaches and creative solutions to utility rates studies providing cost effective and affordable solutions.
3. The Erickson Northstar/WSB project team is designed specifically for the City of Wyoming and represents experienced professionals who will be working on this project. The team assigned to this project is experienced in performing utility rate studies from years of both practical local government experience and national management consulting experience. 1) it represents the staff who will be directly responsible for your project; 2) it provides a range of expertise to cover the range of service requirements; 3) it provides a solid record of utility rate-setting knowledge to achieve your objectives; 4) it provides significant experience in utility asset renewal and replacement and capital improvement planning; and 5) it represents the commitment to take personal and professional responsibility for the services and outcomes for the City of Wyoming.

In summary

Helping local governments succeed is not just our livelihood, it is our passion. Over our careers as both local government managers and consultants, each member of the Erickson Northstar/WSB team has built a record of success helping local governments improve their services across the United States. We are confident that a careful review of our proposal, the qualifications and experience of our team, and

significant experience with similar organizations will provide the City of Wyoming with the confidence that the Erickson Northstar/WSB team is the best choice to assist you on this important engagement.

Erickson Northstar/WSB submits this proposal with the understanding that, if awarded, we will be afforded the opportunity to negotiate in good faith with the City to reach mutually agreeable terms and conditions prior to executing a final contract.

Should you have any questions or desire further information, please feel free to contact us at any time. Our team would consider it a professional and personal privilege to provide these services to the City of Wyoming.

Sincerely,



Alan J. Erickson



Nicholas R. Dragisich, P.E.

Erickson Northstar, LLC
8225 133rd Place,
Savage, MN 55378
(612) 799-0236
aandmerickson@gmail.com



Our understanding of Wyoming's needs

The City of Wyoming is seeking a qualified consultant to conduct a Stormwater Utility Rate Study. The intent is to provide the City of Wyoming with a report establishing equitable stormwater rates for residential, commercial, industrial, and institutional customers.

The City's annual financial report for fiscal year ended December 31, 2024, shows the Surface Water Fund had positive operating income of \$127,516. The fund experienced an increase in net position of \$157,559 primarily resulting from the \$127,516 in operating income, \$25,043 of investment income, and \$5,000 of refunds and reimbursements.

Cash and cash equivalents increased by \$210,669 from \$582,508 at the beginning of the year to \$793,177 resulting primarily from cash provided by operating activities as well as interest and investments. The Surface Water Fund had no outstanding debt.

Erickson Northstar/WSB consultants believe utility rates should be based on four primary objectives:

- Ability to maintain and expand each utility's capital assets
- Maintain financially viable utility operations
- Maintain acceptable user rates, fees, and charges
- Complement the local government's overall development and financial goals

Our approach is based on achieving these objectives through our extensive utility operations financial expertise which includes:

- Understanding of cash flow requirements over the course of the fiscal year as opposed to solely on a year-end basis
- Establishing an adequate level of cash reserves for operating and capital needs and to comply with any existing and projected debt covenants required by debt providers
- Understanding the impact of future debt needed for new capital assets and for asset renewal and replacement
- Rates and rate allocations to debt service that make sense from debt management and loan and/or bond covenant perspectives
- Including an analysis of key credit rating criteria and the impact of the City of Wyoming's financial projections on those criteria;
- Integrating future debt for the Surface Water Fund into the City's overall financial plan:
 - Consistent with the City's Debt Management Plan
- Developing effective communications to present complex financial concepts/plans to the governing body and public; and
- Assist in the formulation of policies that address assumptions used in rate setting related to excess revenues and criteria for cash/debt funding of projects, etc.

The purpose of utility rate setting is to determine the revenue requirements and total costs of service to be met from utility rates and fees among customer classes in accordance with generally accepted and legally defensible methodologies. Proposed new rates or required adjustments to the existing utility rates and fee structures should recover costs while providing equity among the users. In addition, recommended rates and fees should at a minimum:



Project Understanding

- Be easy to administer by the City
- Be easily understandable by the City's utility customers
- Reflect the true cost of service, including debt service, to preserve financial self-sufficiency while meeting level of service objectives
- Be consistent with industry practice for utility rate making both nationally and in the State of Minnesota
- Account for the impact of current and future environmental regulations; and
- Recognize other impacts as identified and/or required.



Erickson Northstar, L.L.C./WSB's Qualifications

Erickson Northstar Introduction

Erickson Northstar consultants have provided consulting services to local government across the United States. Our consultants bring a solid background of experience to our clients both as former local government managers and as consultants to local governments. Their experience includes service with Springsted Incorporated and with Baker Tilly, LLP. Our focus is providing local governments and not-for-profit organizations with high quality consulting services providing a balance of national perspective and local expertise.

Local governments are under a great amount of pressure to deliver high quality services in a fiscally constrained environment. The evolution of technology and the impacts of the pandemic have heightened residents and businesses expectations of service delivery resulting in traditional methods and means of service delivery no longer meeting expectations. This scenario is not likely to change at any time in the future. Elected officials and public administrators are under pressure to adapt and to employ new and innovative solutions that require progressive leadership, creative partnerships, cautious risk taking and an investment in their personnel and organizational foundation. There is a compelling need in the public sector to enhance and enrich their organization, their people, their processes, and their systems to deliver more value by maximizing the use of public resources in meeting the current and future need of their stakeholders to achieve more success in the marketplace of public opinion.

Erickson Northstar, L.L.C. will provide a team of senior, experienced consultants with direct experience in stormwater operations and management. Our team has assisted approximately thirty local governments with utility rate studies over the past five years. They will use a time-tested methodology to perform their analyses working in close collaboration with City staff and the City Council.

Clients the Erickson Northstar, LLC consultants have assisted with utility rate studies in the past include:

- City of Savage, Minnesota – 2025 Water and Sanitary Sewer Rate Study (currently in progress)
- City of Taylors Falls, Minnesota – 2025 Water, Sanitary Sewer and Storm Water Utility Rate Study
- City of Wyoming, Minnesota – 2023 Water and Sewer Rate Study
- Village of Lemont, Illinois - 2023 Water and Sewer Rate Study (performed when with Baker Tilly, L.L.C.)
- Saint Paul Regional Water Services - 2022 Cost of Services Water Rate Study for Retail and Wholesale Customers (performed when with Baker Tilly, L.L.C.)
- Town of Sudlersville, Maryland – 2022 Water and Sewerage Utility Rate Study (performed when with Baker Tilly, L.L.C.)
- Village of Cary, Illinois – 2022 Water and Sewer Rate Study (performed when with Baker Tilly, L.L.C.)
- City of Saint Paul, Minnesota – 2022 Sanitary and Storm Sewer Rate Study (performed when with Baker Tilly, L.L.C.)
- City of Chisholm, Minnesota – 2021 Water, Sewer, and Solid Waste Collection Utility Rate Study (performed when with Baker Tilly, L.L.C.)



Project Approach

- City of Ashland, Wisconsin -2021 Review and Analysis of Water and Sewer Budgets (performed when with Baker Tilly, L.L.C.)
- City of Lino Lakes, Minnesota – 2021 Water and Sewer Rate Study (performed when with Baker Tilly, L.L.C.)
- Black River Falls Municipal Utilities, Wisconsin – 2021 Sewer Utility Rate Study (performed when with Baker Tilly, L.L.C.)
- City of Montgomery, Minnesota – 2021 Water, Sewer, and Storm Water Rate Study (performed when with Baker Tilly, L.L.C.)
- City of Wyoming, Minnesota – 2020 Stormwater Utility Analysis (performed when with Baker Tilly, L.L.C.)

WSB Introduction

WSB LLC is a design and consulting firm, specializing in engineering, community planning, environmental, and construction services. Our staff of over 1,500 staff nationwide improve the way people engage to build resiliency across our communities, transportation, infrastructure, energy, and environmental systems. We offer services in over 50 complementary areas that seamlessly integrate planning, design and implementation. Our client base is served from 45 offices in 10 states including our headquarters in Minneapolis.

Demonstrating successful relationships with similar clients

We encourage you to connect with the clients below to learn more about the quality of services our consultants have provided to them. Each client will offer a different perspective as you consider your own needs.

City of Savage, Minnesota			
Name	Matt But	Title	Finance Director
Phone	+1 (952) 882-2691	Email	mburt@SavageMN.gov
Services	Erickson Northstar, LLC was engaged by the City of Savage to conduct a Water and Sanitary Sewer Utility Rate Study to determine the appropriate rates, fees, and charges needed to adequately fund these operations over the next five years. This project is currently in progress and will include a review of each utility’s historical revenues and expenses, their 2025 budgets and actual performance to date, the City’s capital improvement plan, historical consumption and customer data, projected growth of the customer bases, and current outstanding debt repaid from each utility. Using this information, a projection of each utility’s financial performance over the next ten years is being developed based on current rates and then on rates needed to provide sufficient revenues to adequately fund each utility.		

City of Taylors Falls, Minnesota			
Name	Sherrie Thomsen	Title	City Clerk
Phone	+1 (651) 465-5133 Ext 21	Email	rclerk@taylorsfalls.org
Services	Erickson Northstar, LLC was engaged by the City of Taylors Falls to review and analyze the City’s Water, Sewer, and Storm Water Utility Funds to determine the appropriate rates, fees, and charges needed to adequately fund these operations over the next five years. Our Final Report included a review of each fund’s historical revenues and expenses, their 2024 budgets and actual performance to date, their projected 2025 budgets, the City’s capital improvement plan, historical consumption and customer data, projected growth of the customer bases, and current outstanding debt repaid from each fund. Using this		



Project Approach

information, a projection of each fund's financial performance over the next ten years was developed based on current rates and then on rates needed to provide sufficient revenues to adequately fund each utility.

City of Montgomery, Minnesota			
Name	Brian Heck	Title	City Administrator
Phone	+1 (507) 364-8888	Email	Bheck@cityofmontgomerymn.com
Services	The City of Montgomery engaged Baker Tilly to review and analyze their Water, Sewer, and Storm Water Utility Funds. Our work included a review and analysis of each fund’s historical revenues and expenses, the City’s current capital improvement program, and other relevant data. Based on this review we developed and recommended rates and charges necessary to cover the cost of operations, to maintain current infrastructure, to pay for anticipated capital improvements, and to maintain an adequate level of cash reserves over the next five years. Nick Dragisich was the lead consultant on this project for Springsted Incorporated.		
City of Lino Lakes, Minnesota			
Name	Hannah Lynch	Title	Vice President
Phone	+1 (952) 777-7930	Email	hannah.lynch@moretoncm.com
Services	Baker Tilly was retained to review and analyze the City of Lino Lakes’s Water and Sewer Funds to determine the appropriate rate structures and other revenue sources needed for operations and the financing of capital improvements. Our study provided recommended water and sewer rates through 2026 and confirmed the current WAC/SAC charges were adequate. Nick Dragisich was part of the Baker Tilly team assigned to this project. Hannah Lynch was the Finance Director for the City of Lino Lakes and was our primary contact for that study.		
Village of Richton Park, Illinois			
Name	Mike Wegrzyn	Title	Public Works Director
Phone	+1 (708) 481-8950	Email	mwegrzyn@richtonpark.org
Services	Baker Tilly performed a Water and Sewer Rate Study for the Village of Richton Park as a subcontractor to HR Green, Inc. Our work included a seven-year projection of water and sewer fund financial performance to establish recommended water and sewer rate adjustments which required to ensure that the utilities remain financially sustainable and in compliance with the terms of their bond covenants. We also examined the equity of current water and sewer rates between all utility customers. Nick Dragisich was the lead consultant for the Baker Tilly team assigned to this project		

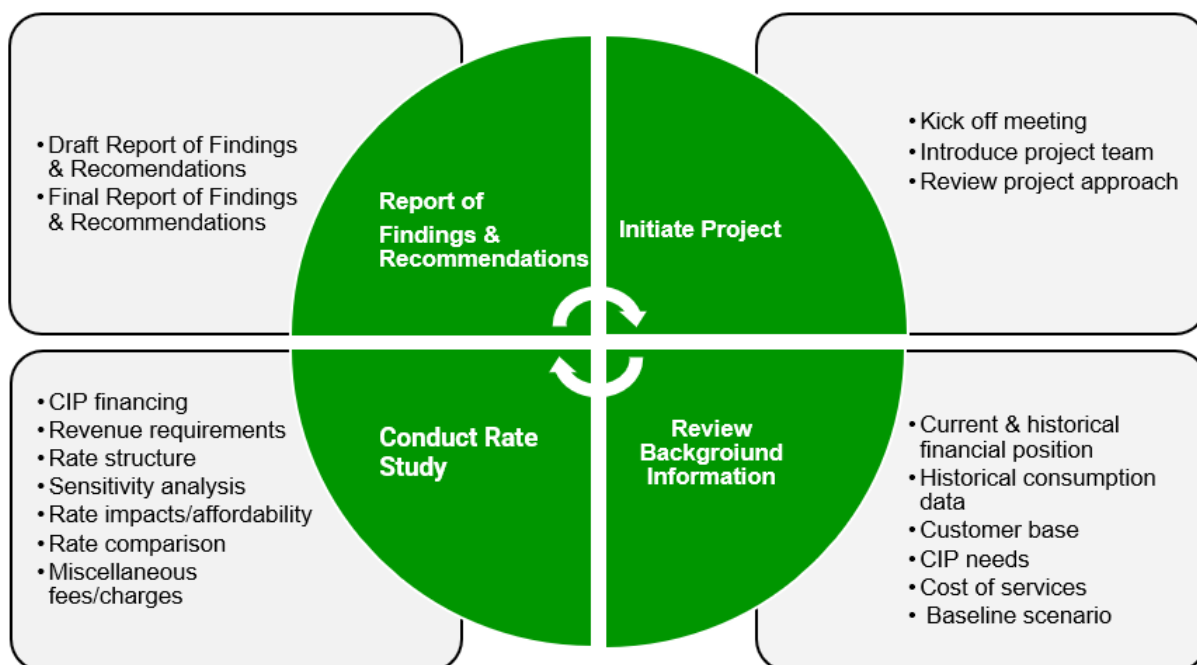


Project Approach

Erickson Northstar, LLC/WSB's staff's expertise in local government management, nationwide consulting expertise and extensive consulting experience make our team the natural choice to perform your Stormwater Utility Rate analysis.

Project Plan

To fully meet the City of Wyoming's needs in this stormwater utility rate study, Erickson Northstar and WSB will complete a detailed scope of work to determine the rates needed for the utility going forward. Our approach to this project is shown in the process diagram below and described in detail in the tasks, and subtasks that follow.



Erickson Northstar/WSB's technical approach would be to review and analyze the City of Wyoming's Stormwater Fund to gain an understanding of its historical financial performance and the current rate structure, fees, and other charges and the basis for each. We would undertake an analysis that would enable the City to determine the appropriate rate structures, fees, and other charges needed for the fund's operations over a five-year planning period based on current knowledge and information.

We would identify the costs of the Stormwater Utility to enable the recovery of those costs of services that provide equity to the users. Equity will be evaluated based on the ability to allocate the cost of service to each customer class in proportion to the benefit received provided the City of Wyoming's accounting system can provide the necessary financial and operating data. We will evaluate the impact of anticipated capital improvement and asset renewal and replacement financing options on rates, fees, and charges and develop recommendations for the financing of the anticipated capital improvements and long-term replacement and renewal of existing assets based on their impact on these revenue sources. We will perform a sensitivity analysis



Project Approach

to illustrate the impacts of adverse assumption changes (e.g. future regulatory requirements, future growth, cost of capital improvements, etc.). The long-term replacement and renewal plan will be based on an empirical probability of failure analysis and the need for periodic asset maintenance (e.g. painting of water towers).

A full cost of service study for the utility will be provided. The cost of services will be allocated based on the data available and a reasonable approach. The cost allocation will be based on *the Financing and Charges for Wastewater Systems* by the Water Environment Federation.

Our approach is outlined in the tasks below

Task 1 *Initiate and mobilize the project*

This task includes identifying a process to develop a mutual understanding of the project scope, objectives, deliverables, and timing as well as ensuring that appropriate City and consultant resources are available and well-coordinated.

- Meet with the City's project management team to commence the project and review the overall objectives, scope, schedule, and work products to be delivered.
- Establish points of contact and project reporting structure.
- Establish a partnership between the Erickson Northstar/WSB project team and their City of Wyoming counterparts to gain a commitment for the project.
- Review the project communication plan, status reporting, and control procedures to be used.
- Finalize the project scope, work plan, and schedule.
- Mobilize project consulting team
 - Brief the project team on the project plan and expectations.
- Prepare and deliver an initial data request for the utility
 - Current rates, fees, and charges
 - Historical financial information, user fees, capacity and development charges, connection charges, customer specific charges, miscellaneous fees and charges, and any other fees and charges that provide sources of revenue
 - Historical operating data
 - Current asset depreciation schedules
 - Current allocation of costs to functional cost components and to rates and charges
 - Any current allocations of capital costs to connection, availability, and other charges and fees
 - Current and historical billing data and customer information
 - Current and past five years operating budgets and Annual Comprehensive Financial Reports
 - Current and projected regulatory requirements
 - Projected operational needs
 - Any existing intergovernmental agreements
 - Current funding practices, funding sources and policies related to financing capital improvements
 - Current capital improvement plans
 - City Code sections related to stormwater utility rates, fees, and charges
 - Existing financial and debt management policies
 - Future planned service sector growth
 - Comprehensive Plan



Project Approach

- Any engineering studies, cost of services studies and other relevant related studies

Task 2 *Review Background Information*

- Current rates, fees, and charges for the utility
- Historical financial information, user fees, capacity and development charges, connection charges, customer specific charges, miscellaneous fees and charges, and any other fees and charges that provide sources of revenue
- Relevant accounts, invoices, and documentation
- City Code sections related to stormwater utility rates, fees, and charges
- Historical operating data
- Current asset depreciation schedules
- Current and historical billing data and customer information
- Existing financial and debt management policies
- Current allocation of costs to functional cost components and to rates and charges
- Any current allocations of capital costs to connection, availability, and other charges and fees
- Current and past operating budgets and Annual Comprehensive Financial Reports
- Outstanding debt and debt services repayment schedules
- Existing debt service coverage requirements for both senior and subordinate debt and the impact of adding additional debt to finance new capital improvements
- Current capital improvement program
- Projected maintenance, repair and/or replacement costs for utility assets
- Current funding practices, funding sources and policies related to financing capital improvements
- Current financial policies
- Interview City staff to identify potential changes in expenses including:
 - Current and projected regulatory requirements
 - Projected growth of the customer base and utility services
 - Operating costs impacts related to assets in the C.I.P.
 - Other
- Relevant engineering studies, cost of services studies and other relevant studies
- Evaluate the current fees and charges to determine whether there are additional service fees and charges that are currently not assessed and that may be applicable to each utility's provision of services

Task 3 *Develop Preliminary Revenue Requirements*

- Analyze the information obtained in Task 2 to identify any omissions and/or inconsistencies and collect additional information, as needed
- Analyze future capital funding needs for the utility including asset renewal and replacement brought about by aging infrastructure
- Develop a preliminary plan for accomplishing the capital improvement program to minimize rate impacts on existing ratepayers
- Develop a preliminary plan to fund asset renewal and replacement for each utility over the planning period
- Update the existing asset depreciation schedules



Project Approach

- Develop recommended annual ending cash balances and reserve levels for cash flow, catastrophes, infrastructure replacement, emergencies, and other purposes
- Develop projected customer growth and future service demands for the utility
- Develop a Microsoft® Excel-based financial rate model that will identify the overall changes in revenues required to provide for adequate funding for major capital improvement programs, to meet all recurring annual operating and capital expenditures, to cover all debt service requirements, to comply with any revenue bond covenants and to maintain sufficient cash balances and capital reserves for the utility.
 - The projections will be made using an income statement approach and will include a yearly cash flow analysis
- Develop a baseline scenario for the recovery of the cost of services that provides equity to the users.
 - Identify the relative responsibility of each rate classification for the recovery of the costs of service that provides equity to the users of the utility. Equity will be evaluated based on the ability to allocate the cost of service to each customer class in proportion to the benefit received.
 - Develop allocation factors for various classes of customers based on peak to average ratios or other appropriate metrics
 - Apportion costs to fixed costs and base (average), maximum day and maximum hour demands
 - Develop fixed costs based on equivalent meter calculations or other appropriate metrics
 - Develop unit cost of services for base, maximum day, and maximum hour demands
 - Compare the cost of service with the revenue received from each customer class to determine if the existing rate structures and charges of the utility are equitable
- Review the baseline scenario and preliminary rate model with the City. Based on this review, we will make modifications or changes incorporating the City's comments into the rate model as appropriate.

Task 4 Conduct Rate Study

- Develop a five-year financial projection for the utility that integrates all anticipated revenue sources, anticipated operating expenditures, including existing and projected new depreciation, anticipated capital expenditures, existing and projected debt service, and changes in the customer base over the planning period:
 - Develop recommendations for the financing of the anticipated capital improvements
 - Evaluate financing alternatives and structures to minimize rate impacts to the greatest extent possible
 - Develop recommendations for cash reserve balances
 - Identify the overall change in revenue required to provide adequate funding for major capital improvement programs, to meet all recurring annual operating and capital expenditures, to cover all debt service requirements, to comply with any existing revenue bond and loan covenants, and to maintain sufficient cash balances and capital reserves
 - The projections will be made using an income statement approach and will include a yearly cash flow analysis
- Develop recommended rates for the utility:



Project Approach

- The rates will provide revenue recovery at levels necessary to support the utility’s operation as defined above for a five-year period.
- Rates developed will include fixed and variable user fees and other fees and charges that provide sources of revenue to the utility
- Our recommended fee/rates will result in no decrease in the stability of revenue streams for the utility, as compared to the current rate structures. Rate structure will take into consideration the following:
 - Current and future cost of providing stormwater services
 - Projected demand
 - The need to fund long-term capital improvements and replacements, and annual capital reinvestment for asset renewal and replacement
 - Funding requirements for all current and anticipated long-term liabilities and debt obligations (bonds and loans)
 - Impact of current and future environmental regulations
 - Maintenance of existing utility assets and infrastructure
 - City’s automated billing system
 - Base rates to cover fixed costs and consumption rates to cover variable costs
 - Ease of administration and understanding
 - Weigh the benefits of any proposed charges in rate structures against the financial impacts on ratepayers, including an affordability analysis for residential customers
 - Perform a sensitivity analysis to illustrate the impacts of adverse assumption changes (e.g., future growth, cost of capital improvements, and mandated requirements under current and upcoming federal and state programs)
- Compare the proposed fees and charges to the current rates, fees and charges and demonstrate the effect of proposed rates on typical utility customers
- Evaluate and compare the proposed fee structures to the utility’s current fee structure and to the fee structure of up to five comparable local governments
- Make recommendations for reasonable operational or policy level strategies (i.e., refinancing, combining or paying off outstanding bond issues, deferring or accelerating capital investment which the City may reasonably consider for mitigating the impact of any proposed/required rate increases)
- Meet with the city project management team to review the preliminary rate schedules, financial projections, and analyses. Based on this review, we will modify or change the rate schedules incorporating the City’s comments as appropriate.

Task 5 *Prepare Report of Findings & Recommendations*

- We will prepare a Draft Report of Findings and Recommendations which will include the consulting team’s findings and recommendations. We will provide the City with the Draft Report in PDF format
 - We will review the Draft Report of Findings and Recommendations with the City staff in a workshop session
 - Based on this review, we will make modifications or changes incorporating the City staff’s comments into the final report as appropriate
- We will provide the City with the four paper copies of Final report and a copy in PDF format

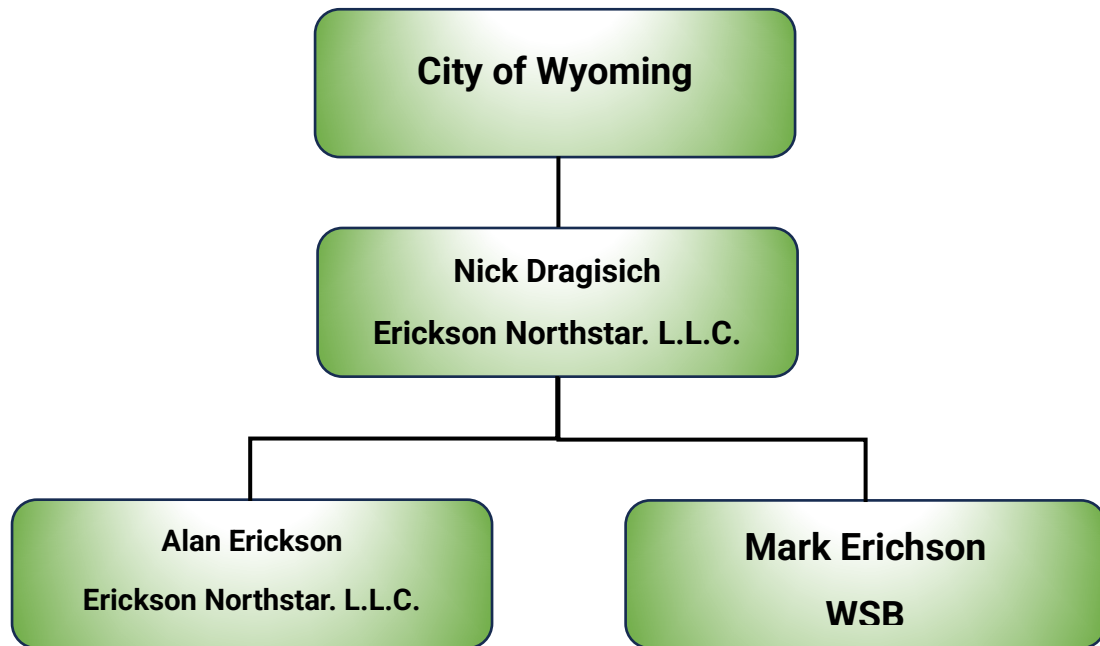


Project Approach

- We will formally present the Final Report of Findings and Recommendations in a meeting selected by the City



Organizational Structure



Project Team

The Erickson Northstar consulting team is comprised of seasoned professionals who offer a collaborative approach to this project and who bring a depth of experience and understanding of the City's needs in this study. Engagement team members are introduced below.

Nicholas R Dragisich, P.E. – Project Lead



Nick Dragisich has more than 40 years of management experience. He has been directly responsible for or involved in numerous utility rate and cost analysis studies, long-range financial planning, capital improvement planning, growth and fiscal impact studies, impact fee studies, debt management organizational management studies, staffing analyses, strategic planning studies, as well as in the development of Excel®-based computer models for clients in California, Illinois, Indiana, Iowa, Kansas, Louisiana, Maryland, Minnesota, Montana, Missouri, Nebraska, New York, North Carolina, North Dakota, South Carolina, Tennessee, Texas, Utah, Virginia, Washington and Wisconsin.

Relevant experience

- Lead the management consulting services practice for Springsted Incorporated and served as a Managing Director for Baker Tilly, LLP in its management consulting practice.
- Served as a city administrator, assistant city manager and city engineer where he managed a staff of up to 1,000 employees and fourteen departments.
- More than 40 years of experience in engineering
- Served as a project engineer for a private firm.
- Managed the design and construction of projects for municipal and private sector clients
- Has been a speaker at state and national conferences on utility rates, long-range financial planning, strategic planning, and organizational management
- Guest lecturer at the University of Minnesota Department of Civil Engineering on how cities finance capital assets
- Served as an elected Mayor and city council member

Education

Master of Business Administration
University of St. Thomas (Saint Paul, Minnesota)

Bachelor of Science Civil Engineering
University of Minnesota – Minneapolis

Registered Professional Engineer in Minnesota and Washington

Industry Involvement:

- American Society of Civil Engineers (ASCE)
- Central States Water Environment Association (CSWEA)
- Water Environment Federation (WEF)
- American Water Works Association (AWWA)

Current Community Involvement

- Member of the Lake Elmo City Council
- Member of the Board of Directors of local homeowners' association



Project Team

Alan J. Erickson - Consultant



Al Erickson has over 40 years of financial, management and consulting experience. During his career he has worked extensively with cities, counties and various not-for-profit organizations assisting them in the areas of financial sustainability, operational and management excellence, and long-term trend analysis. Al's experience in both hands-on management and operational leadership as well as consulting allows him to ask the questions that need to be asked in order to help leadership face their current reality and execute their plans for a successful future.

Relevant Experience

- Executive Vice President for Springsted Incorporated leading the analytical and debt management operations areas while also severing as lead consultant for many client engagements.
- Served as Director of Finance and Administrative Service and Deputy City Manager for the sixth largest city in Minnesota.
- Simultaneously served as Managing Director (CEO) of two consulting firms which worked with not-for-profits in the areas of strategic financial and operational management planning. While there, spearheaded the development and implementation of various proprietary multi-variable models which assessed the financial viability of client operations.
- Has consulted with cities, counties, and not-for-profit clients in more than a dozen different states.
- Has been a speaker on various governmental finance topics both locally and nationally.
- Guest lecturer at Hamline University (Minnesota) graduate program in public administration.

Education

Master of Business Administration

University of St. Thomas (St. Paul, Minnesota)

Bachelor of Arts, Economics and Business Administration

St. John's University (Collegeville, Minnesota)

Industry Involvement:

- Government Finance Officers Association (GFOA)
 - Former Vice Chair of Debt Management Committee
 - Former Member of Economic Development Committee
- Minnesota Government Finance Officers Association (MGFOA)
 - Past President

Awards:

- Thomas J. Moran Award. Presented by the MNGFOA for outstanding service rendered to advance the quality of public financial administration.

Current Community Involvement

- Chairperson of City of Savage, Minnesota Economic Development Commission
- Audit Committee member, Order of Saint Benedict, Collegeville, Minnesota
- Board Member and Treasurer, Crimestoppers Minnesota



Project Team

WSB Personnel

Mark Erichson, P.E.



Qualifications: Mark is a Principal and Senior Project Manager with over 29 years of experience in municipal and civil engineering projects including streets, storm sewers/stormwater management, water distribution systems, sanitary sewer systems, rate studies, capital improvement planning, environmental compliance, asset management, site grading, park improvements, development review, and municipal State Aid systems. His responsibilities include the design and/or preparation of project plans, specifications, construction management, engineer estimates, and permitting. Mark is also currently the City Engineer for the Cities of Wyoming and Hugo. Additionally, he is the Senior Project Manager for the City of Farmington as well as the May Township Engineer.



Proposed Fees

Proposed Fees

Erickson Northstar/WSB will perform all tasks delineated in this proposal for a total professional fee of \$10,425 which includes all direct and indirect costs to complete the project as described in this proposal. Erickson Northstar's portion of this fee is \$8,925 and WSB's portion is \$1,500. Each firm will submit monthly progress invoices to the City of Wyoming for work completed.

Task	Nick Dragisich Estimated Hours	Alan Erickson Estimated Hours	Mark Erichson Estimated Hours	Fees
Task 1	1.5	1.5	1.5	\$ 750.00
Task 2	2.5	2.5	1.0	\$ 950.00
Task 3	9.0	9.0	1.5	\$ 3,000.00
Task 4	10.5	10.5	1.5	\$ 3,450.00
Task 5	6.25	6.25	2.0	\$ 2,275.00
TOTAL HOURS & FEES	29.75	29.75	7.5	\$10,425.00

Additional work

Should the City of Wyoming request and authorize additional work outside the scope of services described in our proposal, Erickson Northstar would invoice the City at either our standard hourly fee of \$150.00 plus any related out-of-pocket costs or at an agreed-upon fee based on the additional scope requested. WSB would invoice the City at their standard hourly fee of \$200.00 plus any related out-of-pocket costs or at an agreed-upon fee based on the additional scope requested. Additional work includes work outside the scope of services as described in this proposal including, but not limited to:

- Work related to a special request
- Additional on-site meetings or presentations
- Additional rate structures
- Additional city utilities for comparison purposes
- Project delays exceeding four weeks attributable to the City

Negotiation

This proposal is submitted with the understanding that Erickson Northstar/WSB will be afforded an opportunity to negotiate a contract with mutually acceptable terms and conditions.

Exceptions

We take exception to the contract requirements stated in the Request for Proposals:

- Section 11 related to indemnification. Erickson will propose different language if selected as stated above
- Section 12 of the RFP requests commercial liability insurance which shall provide minimum limits of \$2,000,000 each occurrence. Our liability insurance policy limits are \$1,000,000 per occurrence and \$2,000,000 aggregate.

Section 12 of the RFP also requests insurance coverages that are not applicable to Erickson Northstar



Proposed Fees

Assumptions

We based our proposed fees on the assumptions detailed below. Should any of these assumptions change during the engagement, we will bring the matter to the City and discuss any impact on the project budget.

- The City leadership is fully committed to the success of this project
- The City recognizes that the services provided are advisory in nature only and that the City will assume full responsibility for implementation decisions
- Erickson Northstar/WSB will have access to, and be provided with, electronic or other readily available data without the need to conduct data extraction or comprehensive synthesis
- The City will assign a designated project manager to provide overall executive guidance and direction to Erickson Northstar/WSB.
- The project schedule is dependent upon the availability of City personnel and elected officials to participate in interviews, focus groups, deliverable reviews, etc.



Proposed Schedule

Proposed Schedule

Erickson Northstar/WSB has the resources to begin your project within ten days of receiving the notice to proceed. We will complete the project within eight weeks provided that all necessary information is made available to us in a timely manner and that City staff are available for meetings as needed according to the approved schedule. Assuming we receive the notice to proceed by October 24, 2025, we would complete the study no later than December 19, 2025.

Below is a tentative timeline based on our experience with previous studies conducted for similar local governments. If we are selected for this project, we will collaborate with City to confirm the project schedule.

ACTIVITY	2025											
	October				November				December			
Task 1 Initiate and mobilize the project												
Task 2 Review Background Information												
Task 3 Develop Preliminary Revenue Requirements												
Task 4 Conduct Rate Study												
Task 5 Prepare Report of Findings & Recommendations												

MILESTONE	DATE
• Meet with City's Project Management Team	October 31, 2025
• Review Background Information	November 7, 2025
• Review the baseline scenario and preliminary rate model with City	November 14, 2025
• Review preliminary rate schedules, financial projections and analyses with City	November 26, 2025
• Present Draft Report of Findings	December 5, 2025
• Present Final Report of Findings	December 16, 2025



Proposal for:

City of Wyoming, Minnesota –
Stormwater Utility Rate Study

Submitted by:



Date: September 29, 2025



Letter of Transmittal

Robb Linwood
City Administrator, City of Wyoming
26885 Forest Blvd, P.O. Box 188
Wyoming, Minnesota 55092

Dear Mr. Linwood,

Precision Consulting Firm, LLC (Precision) is pleased to submit this proposal to support the City of Wyoming in completing a comprehensive Stormwater Utility Rate Study. Our firm brings decades of experience in utility rate analysis, financial modeling, and infrastructure planning. We recognize the importance of establishing an equitable and sustainable funding structure that ensures compliance with the Federal Clean Water Act while balancing fiscal responsibility for residents, businesses, and institutions.

Our track record includes supporting the Cecil County Transit Authority by strengthening its operational analysis and predictive funding models, and conducting a federally funded program evaluation for Georgia College & State University's SANE nursing initiative. These examples reflect our ability to design rigorous methodologies, integrate community-specific data, and produce actionable recommendations under strict regulatory frameworks. We have also delivered rate and cost-of-service studies for other public-sector clients that demanded precision, defensibility, and alignment with long-term capital improvement planning.

We understand the urgency of this engagement given the City's November 18, 2025 presentation schedule. Precision is fully prepared to initiate work immediately upon contract execution, providing continuous communication with City staff and Council to ensure all milestones are met.

I will serve as the primary point of contact for this engagement. If you have any questions or require additional information, please reach out at (646) 553-4730 or via email at governmentcontracts@precisionconsultingcompany.com. Fax (N/A).

Sincerely,

Charlotte Chabot, Co-Founder
Precision Consulting Firm, LLC
1980 Festival Plaza Drive, Suite 300
Las Vegas, NV 89135
Website: <https://precisionconsultingcompany.com/government-contracting.shtml>



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Consultant Qualifications

Precision is a nationally recognized provider of data-driven evaluation, financial analysis, and public-sector consulting services. Since our founding, we have partnered with federal, state, and local agencies to address complex operational challenges and design funding models that are equitable, defensible, and sustainable. Our core mission is to translate technical and financial data into clear, actionable insights that empower decision-makers to align infrastructure needs with long-term fiscal health.

Our firm has developed a reputation for rigorous methodologies in rate studies, cost allocation modeling, and utility system analysis. In recent projects, we have successfully delivered operational and financial evaluations for public transit systems, higher education institutions, and municipal governments. For example, we provided Cecil County Transit Authority with a comprehensive operational analysis that strengthened compliance with state funding requirements while supporting predictive revenue modeling. Similarly, we conducted an in-person, mixed-methods evaluation for Georgia College & State University's SANE program to assess effectiveness and guide federal grant accountability. These engagements demonstrate our ability to manage sensitive, regulated projects while meeting aggressive timelines.

Precision's team integrates expertise across finance, infrastructure planning, policy, and evaluation science. Collectively, our consultants hold advanced degrees in economics, public policy, and engineering, and bring decades of combined experience serving municipal and state agencies. Our internal knowledge systems ensure consistency, quality assurance, and compliance with federal and state regulations. We are accustomed to working within the strict parameters of regulatory frameworks such as the Federal Clean Water Act, and our track record shows we can deliver findings that are technically sound and resilient under public and legal review.

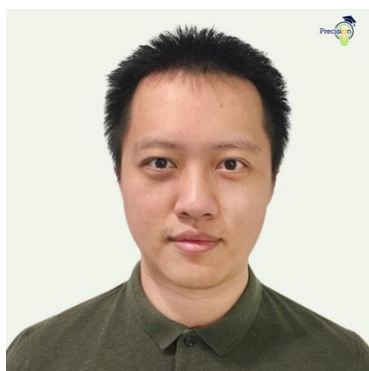
With a proven capacity to manage multi-stakeholder engagements, produce robust technical analyses, and deliver reports on accelerated timelines, Precision is uniquely positioned to provide the City of Wyoming with a stormwater rate study that balances fiscal responsibility, community equity, and regulatory compliance.

Key Personnel

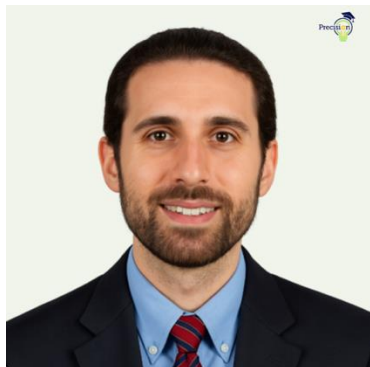
The Consultant shall provide the names, qualifications, and resumes of key personnel assigned to this work and identify the lead client service contact responsible for contract management and administration with the City of Wyoming. Precision has assembled a highly qualified team with demonstrated expertise in financial modeling, infrastructure planning, predictive analytics, stakeholder engagement, and regulatory compliance. Each team member brings complementary strengths to ensure the City receives a defensible, equitable, and actionable stormwater utility rate study.



Charlotte Chabot – Principal in Charge (10% FTE): Ms. Chabot co-founded Precision in 2006 and has since grown the firm into a nationally recognized provider of public-sector consulting services. With a B.A. in Economics from Brown University, she has built a reputation for delivering high-quality evaluations and financial analyses under federal, state, and local regulatory frameworks. For this project, she will provide 10% FTE, focused on executive oversight, quality assurance, and alignment of deliverables with Wyoming’s stormwater management objectives. She will also serve as the lead client service contact, ensuring consistent communication with City leadership and oversight of contractual administration.



Clark Guo – Vice Chairman and Senior Advisor (15% FTE): Mr. Guo, a mathematician and economist trained at the California Institute of Technology and Boston University, co-founded Precision and served as its CEO from 2006 to 2020. He has led interdisciplinary teams on projects involving advanced statistical modeling, machine learning applications, and survey design, building enduring partnerships with Fortune 500 and municipal clients. For this project, he will provide 15% FTE, focused on strategic oversight of financial modeling and ensuring that cost-of-service analyses are rigorous, defensible, and methodologically sound. His involvement will include mentoring senior analysts on the team to safeguard accuracy in all forecasting and scenario modeling.



Dr. Martin Barugel – Director, Machine Learning & Predictive Modeling (25% FTE): Dr. Barugel holds a Ph.D. in Economics and an M.S. in Econometrics from the University of Cambridge and leads a 30-member analytics team at Precision. He is recognized for designing predictive models, geostatistical sampling strategies, and advanced analytics engines used by leading organizations such as Nielsen and ESPN. For the City of Wyoming, he will provide 25% FTE, dedicating his expertise to building forecasting models, revenue requirement projections, and “what-if” scenario testing for stormwater rate structures. His leadership ensures that modeling integrates both short-term financial needs and long-term sustainability goals.



Aaron Houston, MPH – Chief Analytics Officer (30% FTE): Mr. Houston earned his Master of Public Health in Epidemiology from Temple University and oversees all analytics operations at Precision. His prior experience includes serving as a CDC ORISE Research Fellow, where he led national surveillance analysis and co-authored peer-reviewed publications. He is proficient in advanced modeling tools, including SAS, SPSS, Tableau, and MAXQDA, ensuring methodological integrity in both quantitative and mixed-methods analyses. For Wyoming, he will dedicate 30% FTE to affordability-gap modeling, demographic forecasting, and sensitivity analyses, ensuring that the City’s stormwater rates balance fiscal responsibility with community equity. His involvement will guarantee methodological integrity across all quantitative deliverables.



Szamor Williams – Project Manager (35% FTE): Mr. Williams, Precision’s Chief Experience Officer, brings over 11 years of experience in project management, stakeholder engagement, and research operations. He previously served as Chief Operating Officer, where he managed multimillion-dollar public-sector projects and secured over \$2.1 million in new business. His expertise lies in coordinating multi-stakeholder processes, aligning evaluation design with community needs, and maintaining transparent communications. For this project, he will dedicate 35% FTE to daily project management, biweekly reporting, and ensuring communication between the Project Management Team, City staff, and Council. His role will keep schedules aligned with milestones and ensure smooth coordination of deliverables.



Raya Joson – Director of Qualitative Research (20% FTE): Ms. Joson has 12 years of experience in qualitative research and has completed more than 700 projects across multiple sectors. She specializes in thematic coding, stakeholder engagement, and aligning findings with policy frameworks, leveraging both traditional qualitative methods and AI-enabled analysis tools. For Wyoming, she will dedicate 20% FTE to integrating regulatory requirements under MS4 and the Clean Water Act into the analysis, as well as synthesizing stakeholder perspectives into actionable recommendations. She will also prepare accessible narratives to support Council and staff presentations.



Dr. Alexandra Caplan – Research Methodologist & GIS Analyst (25% FTE): Dr. Caplan holds a Ph.D. in Geography from Oregon State University and has expertise in urban sustainability, environmental governance, and spatial equity. She has applied GIS and spatial analysis tools to assess zoning, land use, and demographic changes, producing actionable insights for public-sector clients. At Precision, she leads survey development, structural-equation modeling, and the creation of geospatial visualizations. For Wyoming, she will dedicate 25% FTE to GIS-based evaluations of impervious surfaces, zoning patterns, and population projections, producing visual models that strengthen the defensibility of rate-setting decisions. Her analyses will ensure geographic accuracy and equity in the final recommendations.

Key Personnel References

Precision recognizes that the qualifications of proposed personnel must be validated by prior work on comparable projects. To that end, we provide below a set of references tied directly to each individual identified in the Key Personnel section. These references confirm both the technical expertise and practical experience of our staff in leading financial modeling, stakeholder engagement, policy compliance, and geospatial analysis for public-sector clients. Each contact is familiar with the role our team member played and can attest to their capability to deliver results under conditions similar to those anticipated in this engagement.

Charlotte Chabot – Principal in Charge

- *Georgia College & State University – SANE Program Evaluation*
- Role: Provided executive oversight, ensuring methodological compliance with HRSA grant requirements and aligning deliverables with federal reporting standards. She maintained quality assurance throughout the evaluation and advised on strategic presentation of results.
- Contact: Shantee Henry, Program Director



- Email: shantee.henry@gcsu.edu

Clark Guo – Vice Chairman and Senior Advisor

- *Cecil County Transit Authority – Operational Analysis & Predictive Funding Models*
- Role: Served as senior advisor overseeing statistical modeling and financial forecasting. He ensured methodological rigor in the development of predictive revenue models used to support state-level funding compliance.
- Contact: Suzanne Kalmbacher
- Email: skalmbacher@cecilcountymd.gov

Dr. Martin Barugel – Director, Predictive Modeling

- *Cecil County Transit Authority – Demand Forecasting and Long-Term Planning*
- Role: Led the development of forecasting models and demand projections. He applied advanced econometric techniques to integrate demographic, ridership, and financial data, strengthening operational and capital planning.
- Contact: Suzanne Kalmbacher
- Email: skalmbacher@cecilcountymd.gov

Aaron Houston, MPH – Chief Analytics Officer

- *Georgia College & State University – SANE Program Evaluation*
- Role: Directed quantitative analysis and affordability modeling components of the evaluation. He designed the analytic framework for measuring program outcomes, prepared statistical reports, and co-authored findings presented to HRSA.
- Contact: Shantee Henry, Program Director
- Email: shantee.henry@gcsu.edu

Szamor Williams – Project Manager

- *Cecil County Transit Authority – Operational Analysis & Stakeholder Coordination*
- Role: Served as primary project manager overseeing day-to-day engagement, coordinating data collection, and managing communications with the client. He ensured deliverables were submitted on schedule and facilitated stakeholder alignment across departments.
- Contact: Suzanne Kalmbacher
- Email: skalmbacher@cecilcountymd.gov

Raya Joson – Director of Qualitative Research

- *Georgia College & State University – SANE Program Evaluation*



- Role: Designed and conducted qualitative components, including stakeholder interviews and thematic analysis. She synthesized findings into actionable recommendations and prepared presentations for program leadership and federal reviewers.
- Contact: Shantee Henry, Program Director
- Email: shantee.henry@gcsu.edu

Dr. Alexandra Caplan – GIS Analyst & Methodologist

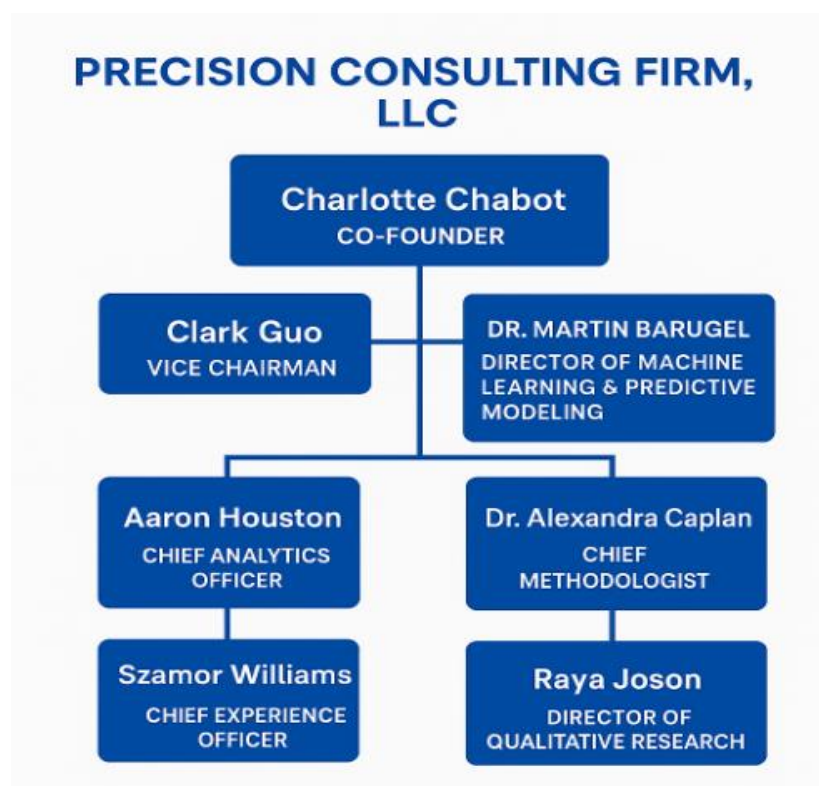
- *Cecil County Transit Authority – GIS Mapping and Spatial Analysis*
- Role: Conducted GIS mapping and spatial equity analyses to support operational planning. She developed visual dashboards and geospatial models to illustrate service gaps and inform long-term transit planning.
- Contact: Suzanne Kalmbacher
- Email: skalmbacher@cecilcountymd.gov

These references demonstrate that the proposed personnel have successfully managed comparable projects requiring technical precision, regulatory compliance, and effective client engagement. Each individual's experience is directly relevant to the scope of this stormwater utility rate study, providing the City of Wyoming with assurance that our team is fully prepared to deliver timely, accurate, and actionable results.

Organizational Structure

Precision has developed a clear organizational structure to manage the City of Wyoming's Stormwater Utility Rate Study. This structure ensures that leadership, technical expertise, and project management are aligned to deliver results efficiently, with appropriate oversight and accountability. The framework is designed to provide the City with a single point of contact while leveraging a multidisciplinary team for technical depth and operational reliability.

Organizational Chart



At the top of the structure, Charlotte Chabot, Principal in Charge, will serve as the lead client service contact. She will oversee contract administration, provide executive oversight, and ensure that all deliverables meet both contractual and quality standards. Reporting directly to her is Szamor Williams, Project Manager, who will coordinate daily operations, manage timelines, and act as the primary liaison between City staff, the Project Management Team, and Precision's consultants.

Supporting the project are specialized technical leads who will provide subject-matter expertise in their respective areas. Clark Guo, Senior Advisor, will contribute strategic oversight, ensuring methodological rigor in financial modeling and guiding the team on rate-setting methodology. Dr. Martin Barugel will lead predictive modeling, cost forecasting, and scenario testing to ensure rates are equitable and sustainable over the five-year horizon. Aaron Houston, MPH, will oversee



affordability analysis and demographic forecasting to balance fiscal adequacy with equity considerations. Raya Joson will lead qualitative integration and compliance alignment, ensuring regulatory frameworks are embedded into the study while supporting stakeholder communications. Finally, Dr. Alexandra Caplan will serve as GIS and spatial analysis lead, applying geospatial methods to assess land-use patterns and geographic equity in stormwater rate allocation.

This organizational structure ensures clear lines of accountability, with executive oversight, project management, and technical expertise working in tandem. By combining leadership stability with technical specialization, Precision offers the City of Wyoming a team that can deliver on scope, schedule, and compliance, while maintaining open and transparent communication throughout the project.



Project Approach

Precision’s approach to the City of Wyoming’s Stormwater Utility Rate Study is grounded in methodological rigor, transparent communication, and actionable deliverables. Our process integrates quantitative modeling, qualitative analysis, and stakeholder engagement to ensure that the resulting utility rates are equitable, financially sustainable, and aligned with federal and state compliance requirements. We will work collaboratively with City staff, the Project Management Team (PMT), and elected officials to deliver a defensible study within the City’s timeline.

Phase 1 – Project Initiation and Data Collection

The initial phase will establish the technical foundation of the Stormwater Utility Rate Study. Precision will begin by formalizing project governance through a kickoff meeting with the City Administrator and the Project Management Team (PMT). This session will confirm roles, decision-making processes, deliverable expectations, and reporting protocols. Our methodology for this phase is designed to achieve early data validation, ensure alignment of financial assumptions, and build the framework for econometric and hydraulic modeling in later stages.

1. Kickoff Meeting and Governance Structure

The kickoff meeting will serve as the operational launch of the study. Precision will present a draft work breakdown structure (WBS) identifying task dependencies, estimated durations, and data requirements aligned with the City’s aggressive November 18, 2025 presentation deadline. We will also establish communication cadences, including biweekly email updates, structured PMT review points, and escalation procedures for any data anomalies. A project Gantt chart will be introduced and adjusted in real time during the kickoff, enabling City staff to visualize milestone sequencing from initial data collection through delivery of the final report.

2. Data Acquisition and Verification

Following the kickoff, our technical team will systematically acquire, review, and validate the City’s existing stormwater-related data sets. This will include both historical and current stormwater billing records extracted from the BS&A billing software system. We will conduct record-level reconciliations to identify anomalies such as duplicate accounts, missing meter equivalencies, or inconsistencies in parcel classifications. Additional data sources to be integrated include the City’s Capital Improvement Plan (CIP) schedule, O&M expenditure records, and prior-year audited financial statements. Verification will involve cross-checking against general ledger entries, departmental budget submissions, and utility revenue accounts to ensure completeness and accuracy.

Data sources to be reviewed include:

- City population projections disaggregated by residential, commercial, industrial, and institutional sectors.



- Historical billing records extracted from BS&A for all customer classes.
- Five-year O&M cost history and departmental budget reports.
- CIP schedule with identified stormwater-specific capital projects and funding sources.
- Historical revenue accounts, reserve balances, and depreciation schedules.

3. Data Standardization and Metadata Documentation

Once data are collected, Precision will standardize formats into a centralized relational database structure. This process will include converting billing and financial data into normalized tables that allow for disaggregation by customer class, meter size, and equivalent residential units (ERUs). Metadata documentation will be developed for each dataset, including definitions, temporal coverage, units of measurement, and limitations. This ensures transparency in all downstream analyses, supports reproducibility, and enables City staff to continue using the data architecture beyond the life of the engagement.

4. Technical Analysis of Baseline Conditions

With verified data in place, Precision will conduct an initial diagnostic analysis of stormwater revenues and expenditures. Using econometric methods such as time-series decomposition, we will identify cost drivers in the City's historical O&M expenditures. For billing data, cluster analysis will be performed to detect consumption and parcel trends across customer classes, enabling us to understand demand heterogeneity within the utility's service base. In addition, GIS overlays will be applied to billing records and zoning data to spatially validate customer classifications, ensuring that residential, commercial, and industrial accounts are properly aligned with their actual land-use designations.

5. Risk Identification and Data Gaps Assessment

A critical task in Phase 1 will be identifying potential risks associated with incomplete or inconsistent datasets. For example, if certain stormwater accounts lack ERU values or if billing data exhibit gaps due to historical software transitions, Precision will develop imputation models using regression-based estimation. We will also flag exposure risks where O&M or CIP data do not include sufficient detail to isolate stormwater-related expenditures. These issues will be documented in a Data Gaps Matrix, complete with recommended remedial steps such as targeted staff interviews, supplementary data pulls, or proxy estimation techniques.

By the conclusion of Phase 1, Precision will have produced a validated and fully documented dataset ready for use in financial modeling and rate design. Deliverables will include: a kickoff summary memo, a consolidated data inventory, a metadata repository, and an initial diagnostic report highlighting baseline conditions and potential risks. This technical foundation will ensure



that subsequent phases, particularly financial projections, cost-of-service allocations, and scenario modeling, are grounded in accurate and defensible data.

Phase 2 – Financial Analysis and Revenue Requirement Development

This phase will establish the City of Wyoming’s long-term financial framework for stormwater operations. Precision will build dynamic financial models to project operating, maintenance, and capital requirements over the 2026–2030 period. The objective is to determine the adequacy of existing stormwater rates and identify revenue requirements necessary to sustain compliance with the Federal Clean Water Act, MS4 program obligations, and the City’s capital improvement priorities.

1. Development of Five-Year Operating & Maintenance Projections

We will construct econometric forecasting models to project five years of O&M expenditures, using techniques such as autoregressive integrated moving average (ARIMA) modeling and variance decomposition to isolate structural versus cyclical cost drivers. Historical expenditure data from departmental budgets will be indexed to inflation and benchmarked against comparable Minnesota municipalities with MS4 permits. For example, line-item costs such as street sweeping, catch-basin cleaning, and inspection programs will be modeled separately, allowing for scenario adjustments in case of regulatory changes or increased compliance monitoring. These forecasts will provide a transparent baseline for understanding the City’s future operating obligations.

2. Estimation of Billing, Collection, and Administrative Costs

Precision will evaluate all administrative and overhead expenses associated with stormwater billing through the BS&A system. This includes labor allocation for billing staff, payment processing costs, bad-debt write-offs, and indirect costs charged from other City departments. Using activity-based costing (ABC), we will trace administrative overhead to specific cost pools, ensuring transparency in how billing and collection contribute to total revenue requirements. Comparative benchmarks will be incorporated, drawing on data from municipalities of similar size to validate cost reasonableness.

3. Revenue Requirement Calculation

The heart of this phase is the calculation of total revenue requirements. Precision will apply the “utility basis” methodology, incorporating O&M costs, depreciation, debt service obligations, and capital funding needs into a single revenue requirement framework. Offsets such as interest income, grant receipts, and miscellaneous fees will be subtracted to isolate net revenue needs. Sensitivity testing will be performed using Monte Carlo simulations to account for uncertainty in cost escalations, interest rate volatility, and capital expenditure timing. This ensures the City can assess not just a single deterministic forecast, but a range of possible fiscal outcomes.

4. Reserve Policy and Long-Term Replacement Planning

In compliance with the RFP's requirement for reserve recommendations, Precision will evaluate the City's current fund balance and establish reserve targets for O&M stability, capital replacement, and emergency contingencies. We will employ cash-flow adequacy testing, comparing projected inflows and outflows under normal and stressed scenarios (e.g., major storm events or unplanned infrastructure failures). A reserve sufficiency index will be generated to guide Council in determining whether current reserve levels are adequate. In addition, we will develop a 20-year replacement and renewal schedule, with annualized reserve targets to maintain long-term system viability.

5. Adequacy Testing of Current Rates

Finally, the adequacy of existing rates will be tested against projected revenue requirements. This will involve running baseline models that apply current stormwater charges to forecasted service demand and expenditures. Variance analysis will be conducted to quantify funding gaps or surpluses by year. If rates fall short, we will identify the precise magnitude of shortfall and its implications on fund balances, deferred maintenance, or regulatory compliance. These findings will form the technical justification for rate adjustments in Phase 3.

By the conclusion of Phase 2, Precision will deliver a comprehensive financial analysis package including: five-year O&M projections, an itemized administrative cost analysis, full revenue requirement calculations, reserve adequacy recommendations, and an assessment of current rate sufficiency. These deliverables will be presented in both tabular and graphical form, enabling City staff and Council to clearly see the fiscal trajectory under current conditions.

Phase 3 – Cost Allocation and Rate Design

The purpose of this phase is to translate the City's revenue requirements into equitable stormwater rates for residential, commercial, industrial, and institutional customers. Precision will apply cost-of-service (COS) principles, allocate costs across functional categories, and design rate structures that are technically defensible, transparent, and legally compliant. The outcome will be a detailed set of recommended stormwater utility rates that reflect both financial sufficiency and fairness in allocation across all customer classes.

1. Functionalization and Classification of Costs

We will begin by functionalizing costs into major service categories, operations and maintenance (O&M), billing and collection, administration, and capital replacement. Each functionalized cost pool will then be classified as fixed, variable, or demand-driven. For example, billing system overhead will be assigned to fixed costs, while street sweeping frequency and sediment removal costs will be categorized as variable O&M expenses. This process ensures that each expenditure



is properly linked to the type of service it supports, providing the foundation for equitable allocation across customer classes.

2. Allocation of Costs to Customer Classes

Once classified, costs will be allocated to customer classes (residential, commercial, industrial, institutional) using a combination of Equivalent Residential Unit (ERU) methodology and demand factor analysis. For residential accounts, billing records will be normalized to standard ERU values. For commercial and industrial customers, impervious surface area and peak-to-average flow ratios will be analyzed using GIS overlays and billing records. Institutional properties such as schools and hospitals will be evaluated separately, applying customized allocation factors to account for unique usage patterns. Precision will develop allocation matrices that clearly show how each cost pool flows through to each customer class.

3. Development of Fixed and Variable Components

To reflect the City's service profile, rates will be structured with both fixed and variable components. Fixed charges will be based on meter equivalency calculations, ensuring recovery of non-consumption-dependent costs such as billing and administrative overhead. Variable charges will be derived from unit cost-of-service analyses, which measure average daily demand, maximum daily demand, and maximum hourly demand. Using regression-based demand models, we will quantify the extent to which each customer class contributes to peak demand, thereby ensuring that rate structures incentivize efficient use while maintaining fairness.

4. Scenario Testing and Sensitivity Analysis

Precision will develop multiple "what if" scenarios to test the fiscal and equity impacts of various rate structures. Scenarios will include:

- **No Rate Increase** – testing the adequacy of current rates over five years.
- **Moderate Rate Adjustments** – phased increases aligned with projected O&M and CIP costs.
- **Aggressive Adjustments** – immediate full recovery of identified funding gaps.

Each scenario will include cash flow projections, reserve balance impacts, and equity indices measuring affordability across customer classes. Sensitivity testing will be performed on key variables such as storm frequency, inflation, and delinquency rates, ensuring that recommendations are resilient under different operating conditions.

5. Rate Design Deliverables

At the end of Phase 3, Precision will prepare draft stormwater rate schedules for 2026–2030. These schedules will include fixed monthly charges by meter size, variable charges by ERU, and class-



specific rates for commercial, industrial, and institutional users. Supporting exhibits will include allocation tables, demand curves, and graphical visualizations of rate impacts across customer categories. All assumptions, methodologies, and allocation factors will be fully documented to withstand scrutiny from Council, regulators, and the public.

Phase 4 – Draft Report and Stakeholder Review

This phase is designed to synthesize all financial, operational, and rate design analyses into a draft report for review by City staff, the Project Management Team (PMT), and the City Council. Precision will emphasize transparency, technical rigor, and clear communication to ensure that stakeholders fully understand the assumptions, methodologies, and implications of the proposed stormwater utility rates. The draft report will be a working document, iteratively refined based on staff and Council feedback.

1. Preparation of the Draft Report

The draft report will be structured to align with the City’s reporting needs, including clear separation of narrative, data exhibits, and technical appendices. It will include a full financial plan (income, expense, and cash flow projections), allocation models, rate schedules, reserve analyses, and scenario results. Technical appendices will detail methodologies such as time-series forecasting, equivalent residential unit (ERU) calculations, and Monte Carlo simulations used in financial projections. All assumptions will be documented explicitly, including inflation indices, demand growth rates, and reserve policy thresholds, so that the City can replicate or audit calculations in the future.

2. Staff and PMT Review

Following submission, Precision will conduct structured working sessions with the City Administrator and PMT to review each section of the draft report. These sessions will focus on validating assumptions, testing interpretations of billing and expense data, and reconciling any differences between staff expectations and model outputs. A “comment resolution matrix” will be developed to track staff feedback, document decisions, and ensure that all requested revisions are incorporated into the final report. Interim deliverables during this step will include draft allocation tables, preliminary rate schedules, and visualizations of rate impacts across customer classes.

3. Council Workshops and Technical Presentations

Precision recognizes that successful adoption depends not only on technical accuracy but also on clear communication with elected officials and the public. To that end, we will facilitate up to two City Council workshops. During these sessions, we will present key findings using accessible visualizations, such as GIS-based maps of impervious surface distributions, graphs of projected fund balances, and side-by-side rate scenario comparisons. Technical staff will be available to respond to detailed questions regarding methodology, including regression assumptions, demand

elasticity factors, and reserve adequacy thresholds. These workshops will serve to build confidence among decision-makers that the proposed rate structures are fair, equitable, and technically defensible.

4. Iterative Refinement Process

Based on staff and Council feedback, Precision will refine the draft report through successive iterations. Revisions may include recalibration of demand assumptions, adjustments to cost-of-service allocation factors, or the incorporation of additional sensitivity analyses requested by stakeholders. Each revised draft will be resubmitted with a summary of changes and an updated comment resolution matrix. This iterative process ensures that the final report reflects not only technical accuracy but also alignment with City priorities and stakeholder concerns.

5. Draft Report Deliverables

Deliverables for this phase will include:

- A full draft report with narrative, exhibits, and technical appendices.
- Draft financial models, rate schedules, and allocation tables in Excel format for staff testing.
- Comment resolution matrix documenting feedback from PMT and Council.
- Presentation materials including PowerPoint decks, infographics, and GIS-based maps for Council workshops.

By the conclusion of Phase 4, the City of Wyoming will have a draft stormwater rate study report that is both technically robust and stakeholder-vetted. The iterative review process ensures transparency, builds stakeholder trust, and positions the City Council to adopt the final recommendations with confidence.

Phase 5 – Final Report and Council Presentation

The final phase of the engagement will consolidate all analyses, stakeholder feedback, and revisions into a polished, defensible final report. Precision will ensure that the document is accessible to multiple audiences, City staff, elected officials, regulators, and the public, while maintaining the technical rigor required to withstand external scrutiny. Deliverables will include both bound hard copies and electronic formats as required by the RFP.

1. Preparation of the Final Report

The final report will integrate financial projections, cost-of-service allocations, rate schedules, and reserve recommendations into a single, comprehensive document. Narrative sections will summarize findings in plain language, while technical appendices will include supporting datasets, modeling assumptions, and sensitivity analyses. For example, appendices will contain demand



elasticity models, Monte Carlo risk assessments, and ERU allocation tables, enabling future audits of the study's assumptions and methodologies. All financial models will be converted into editable Excel workbooks, allowing City staff to update inputs and test new scenarios beyond the life of this engagement.

2. Submission of Required Deliverables

In accordance with the RFP, Precision will provide four bound paper copies of the final report and one electronic PDF. The electronic version will be fully indexed with hyperlinks for easy navigation between narrative, tables, and appendices. Supporting files, including Excel-based models, GIS shapefiles, and visualization dashboards, will be submitted as supplemental deliverables, ensuring the City has full access to both the report and the analytical tools behind it. A transmittal memorandum will accompany the final package, documenting key changes from the draft report and summarizing stakeholder input integrated into the final version.

3. Council Work Session Presentation

Precision will present the final findings at the scheduled City Council work session on November 18, 2025. The presentation will include an executive overview, scenario comparisons, and graphical demonstrations of rate impacts across customer classes. Interactive visualizations, such as projected fund balance trajectories, rate affordability indices, and GIS-based impervious surface overlays, will be used to enhance understanding and support informed decision-making. Council members will also be provided with handouts summarizing key tables, ensuring they can reference core findings quickly during deliberations.

4. Public Communication and Transparency

While the primary audience for the final report is the City Council, Precision recognizes the importance of public transparency in rate-setting processes. We will provide the City with a simplified public-facing summary of the study, designed for website posting or community distribution. This summary will include infographics, FAQs, and plain-language explanations of why rate adjustments may be necessary. By equipping the City with communication tools, we help foster public trust and reduce the likelihood of misunderstanding or resistance to Council's final decisions.

5. Final Deliverables and Handover

Deliverables for this phase will include:

- Four bound copies of the final report.
- One electronic PDF version, fully indexed and hyperlinked.
- Supporting data files, including Excel financial models and GIS shapefiles.



- PowerPoint presentation deck for Council work session.
- Public-facing summary document with infographics and FAQs.
- Transmittal memorandum summarizing final revisions and decisions.

By the conclusion of Phase 5, the City of Wyoming will possess a comprehensive, stakeholder-reviewed, and fully documented stormwater utility rate study. Precision's process ensures that the City has not only the final report but also the analytical infrastructure and communication tools needed to implement the findings with confidence and transparency.



Project Schedule

Precision will deliver the Stormwater Utility Rate Study within the timeline established by the City of Wyoming, culminating in the final presentation to the City Council on November 18, 2025. To achieve this aggressive schedule, the project plan incorporates concurrent workflows, defined task dependencies, and clearly assigned staff responsibilities. This approach ensures technical rigor while meeting the City's deadlines without compromising quality.

Narrative Schedule

Immediately following contract execution in mid-October 2025, Precision (led by Charlotte Chabot and Szamor Williams) will conduct a kickoff meeting with the Project Management Team (PMT). During this meeting, the City Administrator will confirm the City's internal roles, including staff responsible for providing population projections, billing system extracts from BS&A, and capital improvement schedules.

- **In Phase 1 (Data Collection & Initiation):** Precision will lead the review, validation, and formatting of billing and O&M data. The City will provide raw billing extracts, CIP schedules, and audited financial reports. The PMT will review preliminary data inventories and confirm classifications (e.g., institutional vs. commercial accounts).
- **For Phase 2 (Financial Analysis):** Precision will develop econometric forecasts, revenue requirement models, and reserve adequacy tests. The City Finance Department will confirm historical expense coding, validate assumptions about debt service schedules, and provide clarifications on interdepartmental cost allocations. Interim deliverables will be shared with staff for verification prior to moving into rate design.
- **In Phase 3 (Cost Allocation & Rate Design):** Precision will construct cost allocation matrices, ERU-based rate models, and scenario testing. The City will support this phase by verifying property classification data, reviewing GIS overlays of impervious surfaces, and confirming that rate classes align with zoning and land use maps. The PMT will review draft allocation tables to validate technical accuracy and policy alignment.
- **For Phase 4 (Draft Report & Review):** Precision will prepare the draft report and facilitate Council workshops. The City Administrator will schedule PMT meetings and workshops with elected officials. The City Council and staff will provide feedback on draft findings, while Precision documents revisions in a comment resolution matrix.
- **In Phase 5 (Final Report & Presentation):** Precision will prepare bound copies, electronic files, and supporting models. The City Administrator will distribute final reports internally and coordinate Council agenda placement. At the November 18, 2025 work session, Ms. Chabot will lead Precision's presentation, while City staff facilitate public communication of study outcomes.

Milestone Schedule with Consultant vs. City Responsibilities

Task / Phase	Completion Date	Lead Staff (Support)	City Role	Deliverable
Contract Execution & Kickoff Meeting	Oct 15, 2025	Chabot, Williams	City Admin schedules PMT, provides data list	Kickoff agenda, governance plan
Phase 1 – Data Collection & Initiation	Oct 20, 2025	Williams (Houston, Caplan)	Staff provide billing extracts, CIP schedule	Data inventory, baseline diagnostic report
Phase 2 – Financial Analysis	Oct 24, 2025	Houston (Barugel)	Finance confirms expense/debt coding	O&M projections, revenue requirement model
Phase 3 – Cost Allocation & Rate Design	Oct 31, 2025	Barugel (Guo)	Staff validate zoning/land use, PMT reviews	Draft rate schedules, allocation tables
Phase 4 – Draft Report & Council Workshops	Nov 10, 2025	Chabot, Williams (Joson)	City Admin schedules PMT & Council sessions	Draft report, comment resolution matrix
Phase 5 – Final Report & Council Presentation	Nov 18, 2025	Chabot (All Team)	Staff distribute reports, facilitate session	Final bound report, Council presentation

Monitoring and Compliance

Progress will be tracked through a Gantt chart updated weekly by Mr. Williams, identifying both Consultant-led and City-led tasks. Biweekly written updates will be provided to City staff, including variance reports and early warnings if City deliverables (e.g., billing extracts or classification validation) are delayed. This joint accountability ensures that the study progresses smoothly and that the November 18 deadline is achieved.



Cost

Precision submits the following detailed cost estimate for completing the Stormwater Utility Rate Study, broken down by task, personnel, and hours as required by the RFP. Each professional assigned to this project is identified by title, and their respective hourly rates are provided. Meeting and presentation costs are included in the labor estimates. A total not-to-exceed amount is proposed, ensuring fiscal control for the City of Wyoming.

Itemized Cost Estimate by Task and Personnel

Phase / Task	Personnel (Title)	Hours	Hourly Rate	Cost (USD)
Phase 1 – Initiation & Data Collection	Williams (Project Manager) – 20 hrs	\$210	\$4,200	
	Houston (Chief Analytics Officer) – 25 hrs	\$230	\$5,750	
	Dr. Caplan (GIS Analyst) – 20 hrs	\$200	\$4,000	
Subtotal Phase 1		65		\$13,950
Phase 2 – Financial Analysis & Revenue Development	Houston (Chief Analytics Officer) – 30 hrs	\$230	\$6,900	
	Dr. Barugel (Director, Predictive Modeling) – 30 hrs	\$250	\$7,500	
	Williams (Project Manager) – 10 hrs	\$210	\$2,100	
Subtotal Phase 2		70		\$16,500
Phase 3 – Cost Allocation & Rate Design	Dr. Barugel (Director, Predictive Modeling) – 35 hrs	\$250	\$8,750	
	Guo (Senior Advisor) – 25 hrs	\$260	\$6,500	

Phase / Task	Personnel (Title)	Hours	Hourly Rate	Cost (USD)
	Houston (Chief Analytics Officer) – 15 hrs	\$230	\$3,450	
Subtotal Phase 3		75		\$18,700
Phase 4 – Draft Report & Stakeholder Review	Chabot (Principal in Charge) – 20 hrs	\$275	\$5,500	
	Williams (Project Manager) – 20 hrs	\$210	\$4,200	
	Joson (Qualitative Research Director) – 20 hrs	\$200	\$4,000	
Subtotal Phase 4		60		\$13,700
Phase 5 – Final Report & Council Presentation	Chabot (Principal in Charge) – 25 hrs	\$275	\$6,875	
	Williams (Project Manager) – 15 hrs	\$210	\$3,150	
	All Team (Council Presentation Prep) – 15 hrs	\$240 avg	\$3,600	
Subtotal Phase 5		55		\$13,625
TOTAL PROFESSIONAL SERVICES		325		\$76,475
Report Production & Deliverables (binding, 4 hard copies, electronic PDF, public summary)	Admin Support (Fixed)	N/A	Fixed	\$1,500
Total Not-To-Exceed Cost				\$77,975



Optional Services (at City's request only, billed separately)

- Expanded scenario modeling and sensitivity testing beyond RFP scope – \$225/hour.
- Additional public workshops or stakeholder meetings – \$250/hour (inclusive of preparation and presentation).
- Supplemental GIS analyses or mapping – \$200/hour.

Payment Terms

Invoices will be submitted every thirty days and will include a progress report itemizing hours worked by each staff member and task. Payment will be due within thirty days of invoice. Any optional services will be pre-approved in writing by the City and itemized separately from required tasks.



Exceptions and Deviations

Precision affirms that our proposal complies fully with the requirements outlined in the City of Wyoming's Request for Proposals for the Stormwater Utility Rate Study. We have carefully reviewed all sections, including the Scope of Services, Proposal Form and Contents, and Contract Negotiations and Terms, and we do not request any deviations from the specified requirements.

Specifically:

- We accept the insurance requirements, including commercial general liability, automobile liability, workers' compensation, and professional liability coverage at the stated thresholds.
- We agree to provide all deliverables as specified, including four bound copies and one electronic PDF of the final report.
- We acknowledge and will comply with the provisions of the Minnesota Government Data Practices Act and related regulations regarding confidentiality and data management.
- We confirm that all services identified in the RFP's Scope of Services will be provided directly by Precision personnel and not subcontracted without prior written approval from the City.

At this time, Precision identifies no exceptions or deviations from the RFP. Should the City request additional services beyond the stated scope, we will provide a written addendum to clarify any changes to scope, cost, or schedule.



Additional Information

Precision offers the following additional information to highlight the value we bring to the City of Wyoming for the Stormwater Utility Rate Study. While not specifically requested in the RFP, these capabilities reinforce our ability to deliver a comprehensive, defensible, and stakeholder-ready study.

Advanced Modeling Capabilities

Our team integrates advanced econometric, predictive analytics, and GIS-based modeling tools into every utility rate study. For example, we deploy time-series forecasting to model O&M expenditure trajectories, Monte Carlo simulations to evaluate revenue adequacy under uncertainty, and GIS overlays to assess impervious surface area impacts across customer classes. These tools ensure that recommendations are not only technically sound but also resilient under a range of operational and environmental conditions.

Experience with Regulatory Compliance

Precision has deep experience working under federally regulated frameworks such as the Federal Clean Water Act and the Municipal Separate Storm Sewer System (MS4) program. We have assisted municipalities in aligning utility rate structures with National Pollutant Discharge Elimination System (NPDES) requirements while also documenting best management practices (BMPs) to meet permit obligations. This experience positions us to ensure that Wyoming's stormwater rates both satisfy compliance requirements and provide a defensible financial foundation for future audits or legal reviews.

Commitment to Transparency and Stakeholder Engagement

Recognizing that utility rate changes often generate public interest and scrutiny, Precision emphasizes transparency in methodology and clarity in communication. Beyond Council workshops, we provide public-facing summary materials, including infographics and FAQs, to help residents and businesses understand the rationale behind rate adjustments. Our goal is to support the City in not only producing a sound technical study but also in building public confidence in its decisions.

Continuity and Knowledge Transfer

To ensure sustainability beyond the conclusion of this study, Precision will provide the City with editable versions of financial models, allocation tables, and GIS mapping files. This ensures City staff can replicate, update, and adapt the study framework for future years without reliance on external consultants. We also offer optional training sessions for staff on model use and scenario testing, ensuring long-term knowledge transfer.



References

Precision's references demonstrate our ability to deliver rigorous, data-driven analyses that directly support client decision-making and regulatory compliance. We have included client engagements that align closely with the technical, financial, and operational dimensions of the City of Wyoming's Stormwater Utility Rate Study.

Cecil County Transit Authority – Operational Analysis

- *Client Contact: Suzanne Kalmbacher, Director*
- 200 Chesapeake Blvd, Elkton, MD 21921
- Phone: (410) 996-8422 | Email: skalmbacher@cecilcountymd.gov
- To secure and expand transit funding, Precision conducted a comprehensive operational analysis for Cecil County Transit Authority. We enhanced ridership data collection methods, implemented predictive modeling to forecast funding scenarios, and coordinated with neighboring jurisdictions to improve efficiency. The engagement also introduced a flexible reporting system that ensured compliance with Maryland Transit Administration (MTA) requirements while preparing for future revisions. These efforts provided the client with a long-term funding strategy, grounded in defensible operational data.

Georgia College & State University – SANE Program Evaluation

- *Client Contact: Shantee Henry, Program Director – ANE-SANE grant and Assistant Professor*
- Phone: (478) 454-8780 | Email: shantee.henry@gcsu.edu
- Precision conducted an in-person, mixed-methods program evaluation of Georgia College & State University's Sexual Assault Nurse Examiner (SANE) program. The evaluation, funded by an HRSA grant, included stakeholder interviews, outcome tracking, and compliance analysis. Findings provided the University with actionable insights into program effectiveness and opportunities for improvement. This engagement highlights our expertise in federally regulated program evaluations and our ability to synthesize both quantitative and qualitative evidence into clear, actionable recommendations.

State of Oregon – Surplus Property Program Evaluation

- *Client Contact: Sven Anderson, Program Administrator*
- 1655 Salem Industrial Drive NE, Salem, OR
- Phone: (503) 378-6057 | Email: Sven.Anderson@das.oregon.gov
- The State of Oregon engaged Precision to conduct a cost-benefit evaluation of its Surplus Property Program. Our team employed time-series cost modeling, Monte Carlo sensitivity testing, and efficiency benchmarking to assess program effectiveness. The recommendations, adopted in January 2025, resulted in measurable efficiency gains and a



reallocation of under-utilized assets. This project demonstrates our ability to apply advanced quantitative methods to optimize resource allocation within a government framework.

Appendix A- Team Resumes

CHARLOTTE CHABOT

CO-FOUNDER

SUMMARY

As a Paris-born, London-raised executive and leader, I transformed Precision from a two-person consultancy in 2006 into a multimillion-dollar global research and strategy firm. Over two decades, I've driven growth into advanced quantitative analytics, comprehensive regulatory review, and independent ethics oversight—launching Beyond Bound IRB and affiliated brands. Recognized on the Inc. 500 list in 2009 for rapid revenue growth, I draw on data-driven discipline and international insight to build resilient, high-performance organizations.

EDUCATION

2005

BROWN UNIVERSITY | B.A. IN ECONOMICS

- Concentration in econometrics and organizational economics
- Coursework included microeconomic theory, macroeconomic analysis, econometrics, statistical methods, game theory, and public economics
- Member, Economics Club; volunteered as a peer tutor for statistics and introductory economics courses
- Served as a research assistant on faculty-led projects in labor economics and market analysis
- Completed a senior capstone applying econometric models to real-world data trends

WORK EXPERIENCE

2006 - PRESENT

PRECISION CONSULTING FIRM, LLC | CO-FOUNDER

- Named to the 2010 Inc. 500 list as one of America's fastest-growing private companies and recognized as the fastest-growing firm in Rhode Island from 2006 to 2009
- Expanded the core Statistical Consulting practice to cover biostatistics, survey development & analysis, program evaluation, qualitative business statistics, gaming & sports analytics, market research, trading-model development, big-data solutions, and sampling & validity design—serving clients across six continents
- Established the Academic Research & Dissertation Consulting division, providing end-to-end support for master's and doctoral candidates, including topic development, IRB consulting, data collection, analysis, and defense preparation
- Launched Statistical & Economic Expert Testimony services, delivering litigation-ready analyses and expert-witness support in high-stakes business and academic disputes
- Rolled out Academic Editing offerings—"Not Just APA Editing," online-university expertise, and full reference audits—to help clients polish manuscripts for publication and compliance with journal guidelines
- Forged strategic partnerships with leading academic, healthcare, and industry institutions, securing multi-year research contracts and co-development agreements.
- Launched a secure client portal featuring real-time project dashboards and deliverable tracking, boosting transparency and client engagement across all project phases.

CHARLOTTE CHABOT

CO-FOUNDER

WORK EXPERIENCE

2024- PRESENT **BEYONDBOUND IRB | CO-FOUNDER & CEO**

- Created an independent institutional review board delivering rapid, compliant ethics oversight for academic, clinical, and commercial studies.
- Recruited a multidisciplinary panel (medicine, law, epidemiology, biostatistics) and secured OHRP/FDA registration in under eight months.
- Supervised 450+ protocol reviews with a median 12-day turnaround—40 % faster than peer IRBs—while maintaining flawless regulatory records.
- Launched IRB HEART, a self-paced ethics-training program that fulfills federal requirements for biomedical and social-science researchers, boosting investigator preparedness and submission quality.
- Scaled a network of 150+ subject-matter experts across all major therapeutic areas and research phases, ensuring specialist reviewers were always available.
- Introduced transparent, customized pricing models to give clients predictable costs —driving a 30 % increase in institutional service adoption in year one.
- Integrated Beyond Bound with Precision's broader research ecosystem, linking compliance review, methodology support, and training into a seamless end-to-end service.
- Maintained Federalwide Assurance (FWA00034297) and ISO-level quality standards, demonstrating continuous regulatory compliance and upholding the highest ethical benchmarks.

CORE COMPETENCIES

- Business Development & Growth Strategy
- P&L Management
- Global Operations
- Research Governance & IRB Oversight
- Econometric & Statistical Analysis
- Talent Development

SKILLS

- Strategic Planning
- Financial Forecasting
- Econometric Modeling
- Regulatory Compliance (OHRP/FDA)
- Stakeholder Negotiation
- Public Speaking
- Multilingual: English & French

CLARK GUO

VICE CHAIRMAN

SUMMARY

I am the current Vice Chairman and Co-Founder of Precision Consulting Firm, LLC—a company specializing in advanced statistical methodologies and data analysis to address complex business challenges. Under my leadership, Precision built enduring consulting relationships with Fortune 500 firms, earning a spot on the 2010 Inc. 500 list of the Fastest Growing Private Companies in America.

As an accomplished expert witness, my litigation work covers a broad range of statistical and economic topics, integrating Mathematical and Statistical Consulting, Machine Learning, Predictive Analysis, and Survey Development and Analysis throughout my professional journey. Prior to founding Precision, I completed dual bachelor's degrees in Mathematics and Economics at Caltech, followed by graduate studies in Economics at Boston University.

EDUCATION

2006 - 2007 BOSTON UNIVERSITY | MS ECONOMICS

- Specialized in advanced econometric modeling to explore complex economic phenomena.
- Conducted thorough data analysis and statistical modeling, gaining a deep understanding of quantitative research methods.
- Collaborated on research projects, making meaningful contributions to the development of economic theories and models.
- Cultivated a strong ability to apply advanced mathematical and statistical tools to address challenging economic issues.

2014 - 2016 CALIFORNIA INSTITUTE OF TECHNOLOGY | BS MATHEMATICS, BS ECONOMICS

- Gained a solid understanding of mathematical and economic frameworks, enabling thorough academic study.
- Applied mathematical methods to address real-world issues and scrutinize economic data.
- Deepened insight into economic principles and their practical effects through dedicated research.
- Strengthened critical thinking and problem-solving skills through challenging coursework and scholarly pursuits.

WORK EXPERIENCE

NOV. 2020-
PRESENT

PRECISION CONSULTING FIRM, LLC | CO-FOUNDER AND VICE CHAIRMAN

- Collaborate with the executive team to provide critical oversight and guidance for the firm's overall strategic direction, ensuring alignment with long-term goals and objectives.
- Evaluate market trends and competitive dynamics, offering insights and recommendations to enhance the firm's competitive position and sustained growth.

CLARK GUO

VICE CHAIRMAN

WORK EXPERIENCE

Jan 2006 -
Nov 2020

PRECISION CONSULTING FIRM, LLC | CO-FOUNDER AND CEO

- Launched Precision as a forward-thinking firm dedicated to addressing pressing organizational needs through advanced statistical methods, delivering effective solutions across multiple areas.
- Built enduring partnerships with numerous Fortune 500 companies by providing exceptional services in mathematical and statistical consulting, machine learning, predictive analysis, and survey development.
- Guided Precision to earn a coveted spot on the 2010 Inc. 500 list, placing the company among the Fastest Growing Private Businesses in America.
- Developed inventive strategies for handling academic and professional issues, allowing clients to concentrate on their most important goals.
- Led a diverse, expert team skilled in content creation, research, editing, formatting, and both qualitative and quantitative analysis, ensuring each client's needs are met.
- Offered specialized statistical support across various industries, including gaming and sports analytics, economic consulting, trading models, survey design and analysis, biostatistics, medical research, and market research.

KEY STRENGTHS

- Mathematical and Statistical Consulting, Machine Learning and Predictive Analysis, Survey Development and Analysis

SKILLS

- Statistical Analysis, Data Analysis, Expert Witness, Econometric Modeling, Consulting, Survey Development

IN-COURT TESTIMONY, DEPOSITION, AND EXPERT OPINION

- CPS Energy v. AT&T (Sep 2011)
- Camacho v. American Textile (May 2012)
- Lozada v. Classic (May 2011)
- Sanchez v. La Brea (October 2011)
- Barrera v. Bottega (November 2011)
- State of Kentucky v. Brighton Cornerstone, Inc. (December 2011)
- State of Ohio v. Hillbrand Rehabilitation Center (January 2012)
- State of Arkansas v. Heritage Living, Inc. (January 2012)
- State of Ohio v. Wesley Glen Services (January 2012)
- State of Kentucky v. Princeton University (January 2012)
- State of South Carolina v. Amedisys, Inc. (February 2012)
- Borjavs v. Liborio (February 2012)
- State of New York v. St. Elizabeth Centers, Inc. (February 2012)
- Gutierrez v. Vista CreditUnion (February 2012)
- State of Nebraska v. PhysMed, Inc. (March 2012)
- State of Tennessee v. Grandview Medical, Inc. (March 2012)
- State of Tennessee v. CHC Memphis, LLC (March 2012)
- Negrete v. Cenveo (March 2012)
- State of Kentucky v. Nazareth Literary & Benevolent (April 2012)
- Lopez v. Trojan (May 2012)
- Arellano v. Spotless (June 2012)
- State of Texas v. Angels Unlimited Home Health (October 2012)
- State of New Jersey v. Villa Springfield (December 2012)
- State of South Carolina v. Heritage Home of Florence, Inc. (January 2013)
- State of California v. Psychcare of Louisiana (February 2013)
- State of Arizona v. Cypress Home Care, Inc. (February 2013)
- State of Texas v. Gold Horses, LLC. (February 2013)
- State of North Carolina v. Lutheran Home at Trinity Oaks (March 2013)
- State of Ohio v. Berger Hospital (April 2013)
- State of North Carolina v. Silver Bluff, LLC. (November 2013)
- State of Chicago v. Chicago Home Healthcare Agency (January 2014)
- State of Arkansas v. Northport Health Services of Arkansas, LLC. (May 2014)
- State of Philadelphia v. Crossroads Hospice of Philadelphia (June 2014)
- State of Mississippi v. Our Family Home Hospice (November 2014)
- State of Kansas v. Edwards County Hospital & Healthcare Center, LLC (November 2014)
- State of Miami v. JFK Regional Medical Center (February 2015)
- State of Virginia v. Home Nursing Service of Southwest Virginia (August 2015)
- State of Tennessee v. Methodist Healthcare (September 2015)
- State of Texas v. National Medical Home Care (February 2016)

DR. MARTIN BARUGEL, PHD

DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING

SUMMARY

Director, Machine Learning and Predictive Modeling at Precision Consulting Firm, LLC, leading a dedicated team of over 30 analysts with expertise in advanced statistical methodologies, data analysis techniques, and extensive experience in mathematical and statistical consulting. My academic background includes a doctorate in Economics from the University of Cambridge and a Master's degree in Econometrics. Prior to my tenure at Precision, I served as a Professor of Mathematics and Theoretical Statistics at Universidad Torcuato Di Tella, where I specialized in predictive modeling, survey development and analysis, as well as biostatistics and clinical research.

EDUCATION

2000 - 2004 UNIVERSITY OF CAMBRIDGE | PHD IN ECONOMICS

- Demonstrated exceptional expertise in advanced econometric methods and mathematical modeling, strengthening the rigor of my academic work.
- Published original research findings in esteemed economics journals, contributing to scholarly discourse and expanding academic knowledge.
- Successfully defended my doctoral dissertation, highlighting my dedication to advancing economic research.

2014 - 2016 UNIVERSIDAD TORCUATO DI TELLA | BS ECONOMICS, MS ECONOMETRICS

- Developed a deep understanding of economic theory, research methodology, and advanced statistical techniques, demonstrating strong academic expertise.
- Applied econometric methodologies to real-world economic challenges, conducting rigorous data-driven analyses.
- Engaged in scholarly research and delivered impactful academic presentations, refining my ability to communicate complex concepts with clarity and precision.

WORK EXPERIENCE

JAN. 2008-PRESENT PRECISION CONSULTING FIRM, LLC | DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING

- Lead strategic analytical planning using mathematical and statistical consulting expertise for clients like Nielsen, Smucker's, Johnson & Johnson, ESPN, and Clayton Dubilier & Rice.
- Leverage parallel computing to manage data-intensive projects efficiently, applying advanced predictive modeling.
- Develop pattern recognition systems for quality assurance in manufacturing.
- Enhance data collection instruments using exploratory structural equation modeling in collaboration with clients.
- Oversee customized applications for spatial analysis, geostatistics, and geographic sampling design.
- Implement Kalman filtering to forecast commodity prices based on state-dependent correlations.
- Create advanced algorithms that reduce computing time and enable real-time decision-making for large datasets.

DR. MARTIN BARUGEL, PHD

DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING

WORK EXPERIENCE

- | | |
|-------------------------|---|
| JAN. 2008-
PRESENT | PRECISION CONSULTING FIRM, LLC DIRECTOR, MACHINE LEARNING AND PREDICTIVE MODELING <ul style="list-style-type: none"> • Developed self-improving econometric models to enhance predictions of macroeconomic metrics like the US trade balance and non-farm payroll employment. • Designed a trading system based on foreign exchange rate fluctuations driven by discrepancies between anticipated and actual macroeconomic indicators. • Optimized dynamic equilibrium models to improve extended positions in the foreign exchange market. • Led the successful transfer of the firm to a Hong Kong-based hedge fund in 2007, demonstrating expertise in economic analysis. |
| JAN. 2004-
DEC. 2007 | CO-FOUNDER KB HORIZON FOREX MANAGEMENT <ul style="list-style-type: none"> • Developed self-improving econometric models to predict macroeconomic metrics. • Designed a trading system leveraging foreign exchange rate fluctuations. • Optimized dynamic equilibrium models for foreign exchange market positions. • Facilitated the firm's transfer to a Hong Kong-based hedge fund in 2007. |
| JAN. 2004-
DEC. 2007 | ASSISTANT PROFESSOR OF MATHEMATICS AND THEORETICAL STATISTICS UNIVERSIDAD TORCUATO DI TELLA <ul style="list-style-type: none"> • Designed and conducted experiments to evaluate metagame model predictions, providing insights into economic regulation. • Taught multiple doctoral courses in Economics and Econometrics, covering topics like Dynamic Programming, Advanced Econometrics, and Panel Data Analysis. • Developed and introduced the university's first course on MATLAB, expanding academic offerings in programming and computational analysis. |

CORE COMPETENCIES

- Mathematical and Statistical Consulting, Machine Learning and Predictive Analysis, Survey Development and Analysis, Biostatistics and Clinical Research.

SKILLS

- Strategic Analytics, Cluster Computing, Neural Networks, Structural Equation Modeling, Spatial Analysis, Geostatistics, Kalman Filtering, Algorithm Development, Econometrics, Forecasting, Trading Strategies, Dynamic Equilibrium Models, Negotiation, Experimental Design, Teaching, Curriculum Development, MATLAB, Data Analysis, Research, Academic Instruction.

IN-COURT TESTIMONY AND DEPOSITION

- CPS Energy v. AT&T (Sep 2011)
- Camacho v. American Textile (May 2012)

AARON HOUSTON

CHIEF ANALYTICS OFFICER

SUMMARY

With over six years of experience in real-world evidence generation, health outcomes research, and value evidence strategy, I have successfully managed both qualitative and quantitative health projects across diverse topics. I hold a Master of Public Health in Epidemiology from Temple University and a Bachelor of Science in Biology from Howard University. My expertise includes data analysis, manuscript preparation, and statistical programming using SAS/SUDAAN, with experience collaborating with organizations such as the CDC. Additionally, I have a strong background in biostatistics, clinical research, health economics, and grant writing. Beyond research, I have held leadership roles in student associations and remain actively engaged in community service and public speaking.

EDUCATION

- | | |
|-----------|--|
| MAY 2021 | TEMPLE UNIVERSITY MASTER OF PUBLIC HEALTH IN EPIDEMIOLOGY (M.P.H.) <ul style="list-style-type: none"> • Thesis: "Vision Payment Claims Analyses with Health Insurance" • Thesis Advisor: Dr. Krys Johnson, Department of Epidemiology and Biostatistics |
| JUNE 2019 | HOWARD UNIVERSITY BACHELOR OF SCIENCE IN BIOLOGY, MINOR IN CHEMISTRY <ul style="list-style-type: none"> • Earned a Bachelor of Science in Biology, establishing a strong foundation in the life sciences. • Minored in Chemistry, gaining a comprehensive understanding of the physical and chemical principles of scientific research. |

WORK EXPERIENCE

- | | |
|-----------------------------|---|
| AUGUST 2023-
PRESENT | PRECISION CONSULTING FIRM, LLC CHIEF ANALYTICS OFFICER <ul style="list-style-type: none"> • Lead a multidisciplinary team of analysts, engineers, scientists, and BI experts to ensure operational efficiency and collaborative project execution. • Translate complex data insights into strategic recommendations for executive leadership and board-level decision-making. • Oversee daily analytics operations, driving innovation in data methodologies and strengthening team performance. • Spearhead development of advanced analytic techniques and manage deliverables across data engineering and business intelligence functions. • Utilize tools such as Mplus, SPSS/AMOS, SAS, MAXQDA, and Tableau to conduct robust analyses, support grant writing, and deliver client-focused visual insights. |
| AUGUST 2022-
AUGUST 2023 | PRECISION CONSULTING FIRM, LLC PROJECT MANAGER <ul style="list-style-type: none"> • Managed a global client base and team of analysts through daily communication, effectively conveying the value of educational consulting services. • Clearly articulated service impact on client projects, leveraging a strong academic research background. • Applied meticulous attention to detail to review and refine deliverables, ensuring high-quality outcomes. |

AARON HOUSTON

CHIEF ANALYTICS OFFICER

WORK EXPERIENCE

AUGUST 2021- AUGUST 2022 **CENTERS FOR DISEASE CONTROL AND PREVENTION | ORISE RESEARCH FELLOW**

- Conducted literature review and data analysis for CDC DASH using YRBS, ABES, and School Health Profiles, applying SAS/SUDAAN and ArcGIS for statistical and spatial insights.
- Co-authored manuscripts and presentations, collaborating with CDC staff and experts while supporting research coordination and public health messaging.

CORE COMPETENCIES

- Biostatistics, Statistical Consulting, and Grant Writing & Research Funding

SKILLS

- Health Economics & Outcomes Research, SAS/SUDAAN Statistical Software, Manuscript Writing, Real-World Data Analysis, Microsoft Office, Public Speaking, and Spanish

CONFERENCE PRESENTATIONS

- Houston, A. M. (2020, October). APHA Film Festival, APHA Virtual Annual Meeting and Expo.

PROFESSIONAL ORGANIZATIONS

- American Public Health Association (APHA), American Chemistry Society (ACS), National Society of Leadership and Success (NSLS), National Society of Collegiate Scholars (NSCS), National Parks Conservation Association (NPCA)

PUBLICATIONS & PRESENTATIONS

- Houston, A. M., Ruskiwicz, J., Gaal, J. M., Baviskar, C. M., & Latimer, A. (2021). Vision payment claims analyses with health insurance. *CommonHealth*, 2(3), 85–93. Biostatistics & Clinical Research, Mathematical & Statistical Consulting, and Grant Writing & Research Funding
- Jones, S. E., Ethier, K. A., Hertz, M., DeGue, S., Le, V. D., Thornton, J., Lim, C., Dittus, P. J., & Geda, S. (2022). Mental health, suicidality, and connectedness among high school students during the COVID-19 pandemic - Adolescent Behaviors and Experiences Survey, United States, January–June 2021. *MMWR Supplements*, 71(3), 16–21. Biostatistics & Clinical Research, Mathematical & Statistical Consulting, and Grant Writing & Research Funding
- Kilmer, G., Jones, S., Rico, A., Houston, A., Lim, C., Leon-Nguyen, M., & Asher, A. (2024). Changes in illicit drug use among high school students in Southeastern U.S. states—2009 to 2019. *Journal of Prevention*, 45, 815–831. Biostatistics & Clinical Research, Mathematical & Statistical Consulting, and Grant Writing & Research Funding

SZAMOR WILLIAMS

CHIEF EXPERIENCE OFFICER

SUMMARY

Seasoned Chief Experience Officer with over 11 years of international experience in marketing, business development, and strategic growth. Recognized for driving revenue, elevating global brand presence, and leading innovative AI-driven initiatives. A proven leader in crafting impactful marketing strategies, optimizing the customer journey, and championing diversity and inclusion across platforms. Skilled in B2B and B2C engagement, stakeholder collaboration, team leadership, and research operations, with additional expertise in SEO, brand positioning, and program evaluation. Dedicated to cross-functional alignment and achieving measurable business outcomes through thoughtful strategy and exceptional execution.

EDUCATION

- | | |
|-----------|---|
| 2004-2010 | FURMAN UNIVERSITY B.A. IN COMMUNICATION STUDIES <ul style="list-style-type: none"> Concentrated on mass media and rhetorical theory to analyze semiotics, language, and audience impact. Developed foundational skills in corporate communication strategy and high-level messaging for broad audiences. |
| 2004-2010 | FURMAN UNIVERSITY B.A. IN PHILOSOPHY <ul style="list-style-type: none"> Emphasized applied social philosophy and ethics, with particular attention to how individual and communal choices shape societal outcomes. Conducted research exploring the role of perspective in moral reasoning and collective decision-making processes. |

WORK EXPERIENCE

- | | |
|---------------|---|
| 2025- PRESENT | PRECISION CONSULTING FIRM, LLC CHIEF EXPERIENCE OFFICER <ul style="list-style-type: none"> Direct firm-wide client experience strategy, aligning research, marketing, and operations to ensure consistent service excellence. Lead AI integration to streamline service delivery and elevate client satisfaction across the project lifecycle. Oversee cross-sector engagements in healthcare, education, public policy, and corporate research, ensuring high-quality execution. Translate client insights into scalable strategies for onboarding, communication, and workflow optimization. |
| 2023-2025 | PRECISION CONSULTING FIRM, LLC CHIEF OPERATING OFFICER <ul style="list-style-type: none"> Designed and delivered international training programs for analysts, coders, and web developers in qualitative and quantitative research methodologies. Generated over \$2.1 million in revenue through strategic marketing, AI solution development, and enhanced global positioning. Directed multimillion-dollar research operations across sectors including business, marketing, clinical research, higher education, and public policy. Executed a \$247K quarterly Google AdWords campaign and led program evaluation initiatives for government and private-sector clients to optimize impact. |

SZAMOR WILLIAMS

CHIEF EXPERIENCE OFFICER

WORK EXPERIENCE

- | | |
|-----------|--|
| 2022-2023 | PRECISION CONSULTING FIRM, LLC CHIEF STRATEGY OFFICER <ul style="list-style-type: none"> • Led strategic planning efforts across product marketing, program evaluation, and data analytics to drive organizational growth and performance. • Built cross-industry partnerships, developed internal team capacity, and advised executive leadership using market insights to inform business strategy. |
| 2021-2022 | PRECISION CONSULTING FIRM, LLC MANAGING DIRECTOR <ul style="list-style-type: none"> • Built and managed a portfolio of 470+ clients in 15 months while achieving record-breaking individual sales performance at both monthly and annual levels. • Led biopharmaceutical and healthcare research and evaluation initiatives, delivering tailored insights aligned with client objectives. |
| 2018-2022 | PRECISION CONSULTING FIRM, LLC PROJECT MANAGER & INTERIM MARKETING COORDINATOR <ul style="list-style-type: none"> • Conducted daily B2C and B2B sales outreach, consistently leading the firm in customer satisfaction and phone conversion performance. • Led SEO, brand positioning, and social media strategies to strengthen online presence and drive lead generation. |
| 2014-2019 | MEASURED WORDS OWNER <ul style="list-style-type: none"> • Created marketing content for international and domestic clients, tailored to business objectives and audience needs. • Led strategic market planning for clients in healthcare and education, aligning messaging with industry goals. • Developed targeted SEO copy to boost visibility and engagement across digital platforms. |

CORE COMPETENCIES

- Program Evaluation
- Educational Consulting
- Qualitative Analysis
- Biostatistics
- Clinical Research

SKILLS

- Stakeholder collaboration; training program evaluation; resource management; content development; high-performance team coaching; expert relationship management; excellent interpersonal skills; results-driven and goal-oriented.

RAYA JOSON

DIRECTOR OF QUALITATIVE RESEARCH

SUMMARY

Experienced qualitative methodologist and data analyst with 12 years of expertise in phenomenology, systematic reviews, content analysis, and thematic analysis. Having completed over 700 qualitative projects, I bring a deep understanding of research designs and analytical techniques across diverse fields. Highly proficient in NVivo for qualitative data coding and analysis, with additional experience using MAXQDA and Atlas.ti. Skilled in Excel for data coding, analysis, and interpretation, ensuring accurate and meaningful insights. Committed to advancing qualitative research methodologies, I stay up to date with emerging techniques and best practices to enhance data-driven decision-making.

EDUCATION

MAY 2009-
OCTOBER 2012

DE LA SALLE UNIVERSITY | BACHELOR OF ARTS, MAJOR IN ORGANIZATIONAL COMMUNICATION

- Developed a strong foundation in communication theories, organizational dynamics, and strategic practices, demonstrating academic excellence.
- Applied communication methodologies to real-world organizational challenges, crafting effective strategies and delivering ideas with clarity and impact.
- Graduated with Honorable Mention, reflecting a commitment to academic rigor and achievement.
- Achieved a final CGPA of 3.374, showcasing strong academic performance.

WORK EXPERIENCE

JANUARY 2025
- PRESENT

PRECISION CONSULTING FIRM, LLC | CHIEF OF STAFF

- Oversee strategic operations and cross-functional initiatives, ensuring alignment with organizational goals and efficiency in daily workflows.
- Manage executive communications, stakeholder relations, and internal processes to enhance decision-making and organizational effectiveness.
- Lead special projects, policy development, and team coordination, fostering collaboration and driving key business objectives forward.

APRIL 2024-
PRESENT

PRECISION CONSULTING FIRM, LLC | DIRECTOR OF QUALITATIVE RESEARCH

- Lead qualitative research initiatives, ensuring methodological rigor and delivering insightful analysis across diverse projects.
- Oversee data collection, thematic analysis, and systematic reviews to support client research objectives.
- Manage a team of qualitative researchers, providing guidance on best practices, coding techniques, and software utilization.
- Conduct online NVivo walkthroughs, training clients and researchers on qualitative data coding and analysis.
- Develop qualitative research strategies and frameworks to enhance project outcomes and client decision-making.

RAYA JOSON

DIRECTOR OF QUALITATIVE RESEARCH

WORK EXPERIENCE

AUGUST 2023-
JANUARY 2024

PRECISION CONSULTING FIRM, LLC | DIRECTOR OF PROMPT ENGINEERING

- Utilized AI technologies to optimize internal processes and streamline workflows.
- Developed engaging and effective content for websites and communication tools, ensuring clarity and consistency.
- Refined AI-generated prompts using qualitative expertise to enhance relevance and accuracy.
- Collaborated with cross-functional teams to integrate AI-driven solutions into research and business strategies.
- Analyzed AI performance metrics to continuously improve prompt engineering techniques and output quality.

JANUARY 2013-
AUGUST 2023

PRECISION CONSULTING FIRM, LLC | QUALITATIVE ANALYST

- Developed a meticulous and detail-oriented approach to qualitative data analysis, drawing from early experience with manual coding.
- Contributed to over 700 qualitative projects, assisting with coding, results interpretation, and presentation.
- Interpreted qualitative findings and aligned results with relevant theories and literature to ensure well-supported insights.
- Utilized NVivo, MAXQDA, and Atlas.ti for qualitative data coding, thematic analysis, and research synthesis.

CORE COMPETENCIES

- Qualitative Research & Analysis, Research Design & Methodology, Data Coding & Interpretation, Academic Writing & Reporting, and Ethical & IRB Compliance

SKILLS

- Manual Qualitative Coding, NVivo and Excel for Qualitative Analysis, Thematic Analysis, Phenomenology, Content Analysis, Systematic Reviews, Aligning Research Findings with Theories and Literature, Data Presentation and Reporting for 700+ Projects, AI-Enhanced Qualitative Research, and Qualitative Research Communication

AWARDS AND RECOGNITIONS

- 2009–2010: Dean's Lister (1st–3rd Term); Jose Rizal Awardee for consecutive Dean's List achievement
- 2010–2011: Dean's Lister (1st–3rd Term); Consecutive Dean's Lister Awardee
- 2011–2012: Dean's Lister (2nd–3rd Term); Consecutive Dean's Lister Awardee

ALEXANDRA CAPLAN

RESEARCH METHODOLOGIST

SUMMARY

I hold a PhD in Geography from Oregon State University and a Master of Arts in International Relations and Middle East Politics, supported by a distinctive academic background in Physiology and Middle Eastern Studies. My professional journey spans educational consulting, clinical research, and program evaluation, grounded in experience coordinating educational initiatives and providing patient care. I bring fluency in Spanish and working knowledge of Arabic and Hebrew, along with a proven ability to navigate diverse cultural and professional contexts. My research has centered on environmental governance and water resource management, areas that demand both methodological rigor and interdisciplinary thinking. This combination of analytical depth and cross-sector versatility makes me well suited for work that intersects data, policy, and program implementation. I am also passionate about globetrotting, reading, and engaging with different cultures.

EDUCATION

2018 - 2022

OREGON STATE | PHD IN GEOGRAPHY

- Research Focus on Urban Sustainability: Actively engaged in researching urban sustainability, exploring the intersection of geography, urban development, and environmental resilience. Investigating strategies for creating sustainable and equitable urban spaces.
- Expertise in Geographic Information Systems (GIS): Proficient in utilizing Geographic Information Systems for spatial analysis and mapping. Applying GIS techniques to study geographical patterns, environmental changes, and urban dynamics, contributing to the advancement of geographical research methodologies.
- Collaborative Research on Regional Climate Change Impacts: Collaborating on research initiatives focused on the impacts of climate change at the regional level. Investigating how geographical factors contribute to climate change vulnerability and resilience, with a goal to inform policies and practices for sustainable adaptation.

2015- 2018

UNIVERSITY OF LEEDS | MASTER OF ARTS IN INTERNATIONAL RELATIONS AND POLITICS OF THE MIDDLE EAST

- Focus on Israeli-Palestinian conflict, contemporary Middle Eastern politics, the environment conflict nexus, and theories and patterns of intrastate violence.
- Research interests include environmental governance, transboundary water conflict, environmental peacebuilding, and water resource management.
- Dissertation: Israeli-Palestinian Water Cooperation: Preserving Inequalities or Promoting Peace – 60 page thesis that examined the dynamics of cooperative interactions over transboundary water resources between Israeli and Palestinian communities and the contribution they can have towards the wider peace process.

2015- 2018

UNIVERSITY OF ARIZONA | BACHELOR OF SCIENCE IN PHYSIOLOGY AND BACHELOR OF ARTS IN MIDDLE EASTERN STUDIES, CUM LAUDE

- Recipient of Wild Cat Scholarship.
- Dean's List, Academic Year Academic Distinction Spring 2014. Dean's List, Fall 2014.
- Study abroad, Summer 2013, Al-Ahliyya Amman University, Amman, Jordan

ALEXANDRA CAPLAN

RESEARCH METHODOLOGIST

WORK EXPERIENCE

- 2019 CHILDREN'S CENTER FOR NEURODEVELOPMENTAL STUDIES | TEACHING ASSISTANT
- Provided personalized educational consulting to students with autism and other learning disabilities through one-on-one and small group instruction.
 - Designed and implemented weekly lesson plans tailored to each student's learning style and needs, while preparing monthly progress reports for parents.
 - Tracked academic and behavioral data using both qualitative observations and quantitative metrics, collaborating closely with teachers and behavioral specialists to develop and refine individualized education plans (IEPs).
- 2018- PRESENT PRECISION CONSULTING FIRM, LLC | RESEARCH METHODOLOGIST
- Led qualitative research using grounded theory and inductive methods, and designed surveys in Qualtrics to support diverse evaluation and consulting projects.
 - Conducted statistical analysis using techniques such as regression, structural equation modeling, and mediation/moderation analysis across clinical, educational, and program evaluation contexts.
 - Utilized tools including Mplus, SPSS/AMOS, SAS, MAXQDA, and Tableau to analyze data and create impactful visualizations for stakeholders.
- 2018- PRESENT ENVIRONMENTAL LAW INSTITUTE | VISITING RESEARCHER
- Conducted research and curated scholarly content for the Environmental Peacebuilding program's online library, contributing to a conflict sensitivity initiative.
 - Collaborated with UN Environment and academic partners to coordinate and enhance a global MOOC on Environmental Security and Sustaining Peace.
 - Supported course delivery as a teaching assistant, refining materials, assisting with multilingual translation, and facilitating student engagement through forums and virtual office hours.

CORE COMPETENCIES

- Educational Consulting, Biostatistics and Clinical Research
- Program Evaluation
- Qualitative Analysis

SKILLS

- Manual Qualitative Coding, NVivo and Excel for Qualitative Analysis, Thematic Analysis, Phenomenology, Content Analysis, Systematic Reviews, Aligning Research Findings with Theories and Literature, Data Presentation and Reporting for 700+ Projects, AI-Enhanced Qualitative Research, and Qualitative Research Communication

Appendix B- Insurance Certificate



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
7/26/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Gild Insurance Agency 16192 Coastal Hwy Lewes, DE 19958	CONTACT NAME: Maggie Andersen PHONE: 302.300.1810 FAX: (A/C, No): (A/C, No, Ext): E-MAIL: maggie@youngild.com ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: Spinnaker Insurance Company INSURER B: Benchmark Insurance Company INSURER C: INSURER D: INSURER E: INSURER F:
INSURED Precision Consulting Firm, LLC 1980 Festival Plaza Dr Ste 200 Las Vegas, NV 89135-2930	NAIC # 24376 41394

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER:	X	X	CSG-00179846-00	08/01/2024	08/01/2025	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMPIOP AGG \$ 4,000,000 \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	☐ UMBRELLA LIAB ☐ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				☐ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
B	Professional Liability			CBP-00179847-00	08/01/2024	08/01/2025	Per Claim \$1,000,000 Aggregate for all claims \$3,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Proof of coverage

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Margaret Andersen

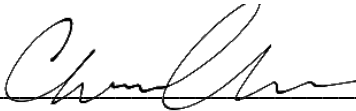
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ACORD 25 (2016/03)

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APPENDIX B
CITY OF WYOMING PROPOSER WARRANTIES

- A. Proposer warrants that it is willing and able to comply with State of Minnesota laws with respect to foreign (non-state of Minnesota) corporations.
- B. Proposer warrants that it is willing and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts or omissions of any officers, employees or agents thereof.
- C. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City of Wyoming.
- D. Proposer warrants that all information provided in connection with this proposal is true and accurate.
- E. Proposer certifies that it can and will provide and make available, at a minimum, all services set forth in the "Scope of Services Requested" section of the City's request for proposals.

Signature of Official: _____ 

Name (typed): Charlotte Chabot

Title: Co-Founder

Firm: Precision Consulting Firm, LLC

Date: September 29, 2025

City of Wyoming

Stormwater Utility Rate Study

PROPOSAL / OCTOBER 10, 2025



A. LETTER OF TRANSMITTAL

October 10, 2025

Mr. Robb Linwood
City Administrator
City of Wyoming
26885 Forest Boulevard
Wyoming, Minnesota 55092

Subject: Proposal for Stormwater Utility Rate Study

Dear Mr. Linwood:

Raftelis is pleased to submit this proposal to the City of Wyoming (City) to complete a stormwater rate study, establishing equitable stormwater rates for residential, commercial, industrial, and institutional customers. We very much appreciate the opportunity to detail our team's qualifications and experience and our approach to help the City meet its goals.

With more than 190 consultants, Raftelis has the largest and most experienced stormwater, water, and wastewater utility financial, rate, program development, and management consulting practice in the country. Our Stormwater Management Consulting Division comprises industry experts who have worked with over a hundred stormwater programs to implement stormwater fees and update rate structures. For this project, we have assembled a team that leads the industry in stormwater utility rate consulting. With 15 years of experience in all aspects of municipal stormwater management, including program development, rates and rate structures, and regulatory programs and finance, I will serve as Project Manager. We have included several other experienced consultants on our team to provide unparalleled resources and expertise for this project. In addition, our full staff of financial and management consultants will be available to provide support for the project as necessary.

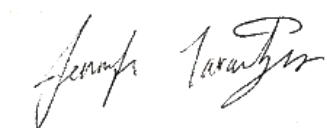
There are several specific reasons that we feel that this team can be of best service to Wyoming on this project:

- We are unparalleled in our stormwater funding experience and will serve as a highly experienced partner to the City in developing the City's stormwater program, including costs, and updating stormwater rates.
- We have a unique blend of engineering, finance, and stormwater utility subject matter expertise to provide the City with sustainable and equitable stormwater rates that can sufficiently fund the City's desired stormwater program.
- Our wealth of experience allows us to move fast and execute the project on the City's timeline.

We are proud of the team that we have assembled and the resources that we can offer, and we welcome the opportunity to be of assistance to the City of Wyoming on this engagement. If you have any questions, please do not hesitate to contact me or our Project Manager using the information below.

Jennifer Tavantzis, Vice President
807 E Main St Suite 6-050, Durham, NC 27701
P: 919.475.5257/ E: jtavantzis@raftelis.com

Sincerely,

A handwritten signature in black ink, appearing to read "Jennifer Tavantzis". The signature is fluid and cursive, with the first name "Jennifer" written in a larger, more prominent script than the last name "Tavantzis".

Jennifer Tavantzis

Vice President

Name of Firm: Raftelis Financial Consultants, Inc. (DBA Raftelis)

Local Address: Our closest office is in Kansas City, MO. The address has been provided below:
215 W. Pershing Road, Suite 406, Kansas City, MO 64108



Giving back

The Raftelis Charitable Gift Fund seeks to make a difference on issues that matter to our clients and employees by helping build sustainable, inclusive communities locally and worldwide. We do this by allocating company profits and employee contributions of time and money. We support organizations that:

- Promote efficient, sustainable resource use
- Advance diversity, equity, and inclusion within the public sector
- Invest in access to clean water and sanitation
- Help vulnerable communities by addressing affordability issues



Raftelis is registered with the U.S. Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) as a Municipal Advisor.

Registration as a Municipal Advisor is a requirement under the Dodd-Frank Wall Street Reform and Consumer Protection Act. All firms that provide financial forecasts that include assumptions about the size, timing, and terms for possible future debt issues, as well as debt issuance support services for specific proposed bond issues, including bond feasibility studies and coverage forecasts, must be registered with the SEC and MSRB to legally provide financial opinions and advice. Raftelis' registration as a Municipal Advisor means our clients can be confident that Raftelis is fully qualified and capable of providing financial advice related to all aspects of financial planning in compliance with the applicable regulations of the SEC and the MSRB.

B. TABLE OF CONTENTS

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C. CONSULTANT QUALIFICATIONS / PROFILE

Consultant Qualifications/Profile

HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE

Local government and utility leaders partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 700 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

With over 190 consultants, we have the largest practice in the nation focusing on the financial and organizational aspects of stormwater, wastewater, and water utilities. Raftelis' Stormwater Management Consulting Division has over 20 consultants with unmatched experience in stormwater management consulting and utility financial/rate consulting. We bring a unique combination of skills and knowledge to each project to provide maximum value to our clients. We work with our clients to identify and implement stable and sustainable financial mechanisms and practices that fund regulatory compliance, ongoing infrastructure maintenance and capital needs. In a time of strained resources nationwide, Raftelis works in all aspects of funding strategy development to help ensure our clients' ability to serve their customers over the long term. Our stormwater services range from modifying existing rate structures to better reflect utilities' cost drivers, to setting up new utilities and fees, to assisting local governments with integrating bond funding into long-term plans and bond sales.

Our Stormwater Management Consulting Division comprises consultants experienced in local government stormwater management and utility program implementation. The Raftelis team possesses expertise in financial analysis, civil engineering, public administration, and information management. For our stormwater clients, we execute a diverse range of analytical and evaluative projects including policy development, process development, data management, and public stakeholder processes. For clients just beginning to differentiate stormwater service delivery from street maintenance or water/wastewater to those with well-established stormwater programs wishing to improve service delivery, fee structures, or customer service, our staff has helped a number of stormwater programs evaluate alternative policies, benchmark their programs and policies, document and improve business processes, and develop and implement new funding structures and programs.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City and help to make this project a success.

RESOURCES & EXPERTISE: Specialized and highly experienced utility stormwater program and funding consultants that all stakeholders can have confidence in. Our team members are the most experienced in evaluating stormwater programs, including the implementation of new fees and rate structures. Our team is practiced in reviewing current programs and identifying opportunities for improvement. We are experts in stormwater program management, and work with clients at every step, from updating rate structures to reviewing current finances and creating long-term financial plans that help our clients get where they want to go.

HISTORY OF SIMILAR SUCCESSES: A long track record of past similar work will help the City avoid potential pitfalls on this project and provide the know-how to bring it across the finish line. Raftelis staff have assisted 1,700+ local governments and utilities throughout the U.S. to meet wide-ranging needs and objectives. Our stormwater staff have consulted with over a hundred jurisdictions facing the questions the City now faces and have helped to determine if a stormwater rate structure update or rate increases are appropriate. Our range of experience allows us to provide innovative and insightful recommendations to the City and will provide validation for our proposed methodology ensuring that industry best practices are incorporated.

DATA DEVELOPMENT EXPERTISE: Careful, comprehensive data creation supports accurate billing. Our staff has both developed new and evaluated existing impervious area data that serves as the basis for fee billing for dozens of implemented stormwater utilities. Our team is comprised of industry experts in developing best-in-class spatial data to support rate studies and updates. We have a well-established practice for translating suitable data into equitable and understandable structures for ratepayers and other stakeholders, and for incorporating industry best practices are incorporated into our recommendations.

USER-FRIENDLY MODELING: A modeling tool that your staff can use for scenario analysis and financial planning now and into the future will be key for the City going forward. Our financial models are tools that allow us to examine different policy options and cost allocations and their financial/customer impacts in real time. Toggable inputs and variables built into our models allow for quick comparisons between different levels of service and growth scenarios. These cascade into dynamic dashboarding with graphs and charts to convey financial data to the public and public officials during presentations in a way that clearly depicts revenue sufficiency and sustainability, providing a complete financial picture of a program. Our spreadsheet models are non-proprietary and are developed with the expectation that they will be used by the City as a financial planning tool long after the project is complete.

RATES THAT ARE UNDERSTANDABLE: For a new stormwater utility to be a success, rates must be successfully communicated and implemented. Buy-in from stakeholders is a crucial component of the rate design process. We incorporate feedback from stakeholders at each step, beginning with information gathering at the outset of the project, and maintaining regular and open communication with the City staff and stakeholders throughout rate alternative selection and design. The design process is iterative, and this consistent communication helps sustain engagement, ensures diverse ideas and perspectives are incorporated, and yields better results. Raftelis has assisted numerous agencies communicate with stakeholders and get proposed rate structures successfully adopted by governments. We focus on effectively communicating the financial consequences and rationale behind recommendations to promote successful rate adoption and to build public trust.

32 years
serving the
public sector

How we stack up

OUR TEAM INCLUDES

190+ consultants focused on
finance/management/communication/
technology for the public sector

20+ consultants focused on
drainage funding and utility development

2 chairs & **16** members of
**AWWA and WEF utility finance and
management committees and subcommittees**

RAFTELIS HAS PROVIDED ASSISTANCE FOR

1,700+ public agencies
and utilities

that serve more than

25% of the
U.S. population

including the agencies serving

41 of the nation's
50 largest cities

we have implemented

75+ stormwater utilities
across the country

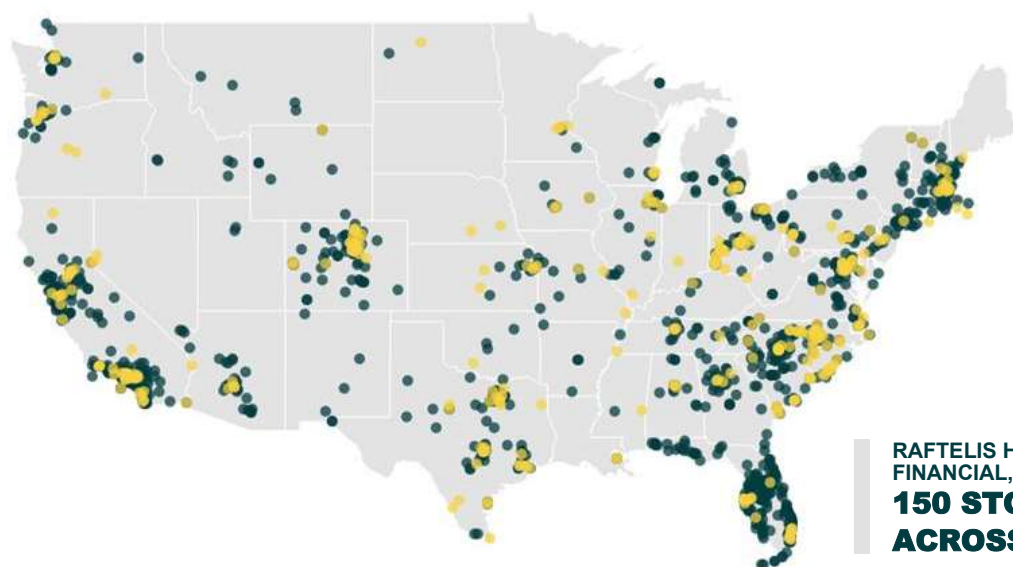
in the past year alone, we worked on

1,300+ projects for **700+** agencies in **47** states

Experience

RAFTELIS HAS THE MOST EXPERIENCED PUBLIC UTILITY FINANCIAL AND MANAGEMENT CONSULTING PRACTICE IN THE NATION.

Raftelis has assisted many utilities across the United States. Our Stormwater Management Consulting Division, who will work on the City's project, is a small, close-knit interdisciplinary team with unparalleled experience in developing and implementing stormwater utilities, having worked on more than 250 stormwater projects for over 150 public agencies across the country. Raftelis' stormwater services range from setting up new utilities and fees to modifying existing rate structures to better reflect utilities' changing cost drivers. In addition to our strong financial, policy, and data analysis skills, our expertise in program development and regulatory issues, stakeholder facilitation, and customer service provision allows us to assist clients with their program development and public relationships during utility development, implementation, and post-go live periods. The map below shows all Raftelis utility and local government clients in dark blue dots with Raftelis stormwater clients shown in yellow dots.



RAFTELIS HAS PROVIDED PROGRAMMATIC, FINANCIAL, AND UTILITY SUPPORT TO
150 STORMWATER CLIENTS
ACROSS THE U.S.

City of Wheat Ridge CO

Upon completion of a comprehensive stormwater needs assessment study, the City of Wheat Ridge (City) engaged Raftelis to conduct a stormwater utility feasibility study, to evaluate the feasibility of establishing a fee and funding an greatly enhanced program with the new revenue stream. As part of the analysis, Raftelis measured the impervious surfaces on a sample of single family residential properties and estimated impervious surface area across the remainder of the service area. Raftelis completed the analysis within a 2-month timeframe, recommending a financial plan and approach that could be supported with new fee revenue.

Boulder County CO

Raftelis was engaged by Boulder County (County) to evaluate the feasibility of establishing a stormwater utility and fee. The County has historically funded stormwater management through General Fund tax revenue. While current funding for stormwater management has been sufficient to meet basic necessities, the County anticipated a need for increased funding to meet more stringent state regulations, as well as costs brought on by climate change-related

extreme precipitation events. The County is seeking a more stable revenue stream to fully and consistently fund a robust stormwater management program and update necessary infrastructure.

Raftelis led a team of two engineering subconsultants to complete this study. The study team documented the current stormwater management program, conducted a gap analysis, developed data, documented historical stormwater-related costs, projected future costs, created a long-term financial plan, determined an appropriate unit of charge, conducted a rate structure and customer impact analysis, and comparison of stormwater rates and policies in peer communities. Raftelis also assisted the County with internal and external communications, as well as establishing policies and processes around billing and customer service.

The implementation was put on hold by the County in 2022 in the aftermath of a large local fire, which heightened sensitivity around instituting a new fee. The project was brought back to the forefront in 2024 and the County reengaged Raftelis to support implementation and updates to the original study findings. This project is currently underway.

Pittsburgh Water and Sewer Authority PA

Pittsburgh Water and Sewer Authority (PWSA) engaged Raftelis in 2016 for a series of projects, one of which was the development and implementation of a stormwater utility and fee. Raftelis assisted with stormwater program development and short- and long-term financial planning. We also led the development of an equitable fee based on impervious area and participated in several public meetings and workshops with key stakeholder groups to convey and discuss the program details. The stormwater program and fee were approved by Pennsylvania Public Utilities Commission in 2020, and Raftelis was engaged to implement the utility. Raftelis assisted PWSA with all aspects of stormwater utility implementation, including development of impervious area data and parcel-to-account relationships, billing policies and processes, credit program, customer outreach materials and website content. The suite of services also included the development of the Stormwater Billing Information System (SBIS) software to support utility administration and integrates with PWSA's existing utility billing system. The utility went live in 2022, supported by the new software. Raftelis provides ongoing stormwater program and utility support.

City of Greeley CO

Raftelis professionals have completed a variety of water, wastewater, and stormwater utility financial studies for the City of Greeley (City) since the mid-1990s (services prior to 2013 were provided by our team members while with a previous employer). In 2023, Raftelis began working with the City on a stormwater billing data audit, and update to the long-standing stormwater utility's rate structure. Raftelis developed impervious surface data to inform the analysis, evaluated customer impacts under a variety of feasible rate structure alternatives, and is currently working with the City on an implementation plan to improve revenue sufficiency and the equity of stormwater cost recovery.

Stormwater Utility Fee & Program Experience

Raftelis' stormwater services range from setting up new utilities and fees to modifying existing rate structures to better reflect utilities' changing cost drivers. In addition to our strong financial, policy, and data analysis skills, our expertise in program development and regulatory issues, stakeholder facilitation, and customer service provision allows us to assist clients with their program development and public relationships during utility development, implementation, and post-go live periods. Here is a matrix showing Raftelis staff members' experience conducting stormwater utility feasibility, implementation, and other related services for agencies across the U.S. (Note that some of these engagements were performed by Raftelis staff members while with previous employers.)

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
AL	City of Prichard	●											
AZ	City of Peoria	●											
AZ	City of Tempe	●											
CA	Modesto Irrigation District						●						
CA	City of Mt. Shasta				●	●							
CA	City of Oxnard			●	●	●	●						
CA	City of Sacramento						●						
CA	San Diego County	●					●						
CA	City of San Jose	●											
CA	Zone 7 Water Agency												●
CO	Adams County							●					
CO	Arapahoe County		●										
CO	Boulder County	●		●	●	●	●		●	●			
CO	City of Aspen			●		●				●			
CO	City of Aurora			●	●	●	●						
CO	City of Berthoud			●		●	●						
CO	City of Boulder			●		●	●						
CO	City of Colorado Springs (fee rescinded)		●										
CO	City and County of Broomfield	●		●	●	●							
CO	City and County of Denver			●	●	●	●						

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
CO	Douglas County	●											
CO	City of Greeley			●	●	●	●						
CO	City of Fort Collins			●			●						
CO	City of Longmont			●	●	●	●						
CO	City of Louisville			●	●	●	●						
CO	City of Littleton			●	●	●	●						
CO	Southeast Metro Stormwater Authority		●					●					
CO	City of Thornton	●	●	●	●	●	●						
CT	Capitol Region Council of Governments	●				●		●		●			
CT	City of New London			●		●	●						
DC	DC Water			●	●		●				●		
DE	New Castle County	●					●	●					
FL	City of Apopka				●	●	●						
FL	City of Cocoa Beach						●						
FL	City of Dunedin			●		●	●						
FL	City of Fernandina Beach	●		●		●							
FL	City of Hallandale Beach			●	●	●	●						
FL	City of Groveland	●				●	●		●				
FL	City of Largo					●	●						
FL	City of Marathon	●	●										●

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
FL	City of Margate												
FL	City of Oldsmar												
FL	City of Sanford												
FL	City of Plant City												
FL	City of Pompano Beach												
FL	Town of Surfside												
FL	City of St. Augustine Beach												
FL	City of Tavares												
FL	City of Treasure Island												
FL	City of West Palm Beach												
FL	City of Winter Haven												
GA	City of Atlanta (fee rescinded)												
GA	City of Cartersville												
GA	Cobb County												
GA	Columbia County												
GA	City of Decatur												
GA	City of East Point												
GA	Fulton County												
GA	City of Gainesville												
GA	Gwinnett County												
GA	City of Griffin												
GA	Rockdale County												
IL	City of Bloomington												
IL	City of Champaign												
IL	City of Rock Island												
IL	City of Urbana												
IL	Village of Western Springs												

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
IL	Village of Wilmette												
IL	Town of Westford												
IN	City of Indianapolis												
IN	City of West Lafayette												
KS	City of Topeka												
KY	Lexington-Fayette Urban County Government												
LA	Sewerage and Water Board of New Orleans												
MA	Boston Water and Sewer Commission												
MA	City of Bellingham												
MA	City of Franklin												
MA	Town of Hudson												
MA	City of Lawrence												
MA	City of Longmeadow												
MA	City of Milford												
MA	Town of Northborough												
MA	Town of Lexington												
MA	Town of Westborough												
MA	Town of Westford												
MA	Town of Yarmouth												
MD	City of Baltimore												
MD	Town of North East												
ME	City of Portland												
MI	City of Marquette												
MO	Metropolitan St. Louis Sewer District												
MT	City of Shelby (fee not passed)												
NC	City of Albemarle												
NC	City of Archdale												

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
NC	City of Asheville												
NC	City of Burlington												
NC	Town of Butner												
NC	Camden County												
NC	Town of Chapel Hill												
NC	City of Charlotte												
NC	City of Creedmoor												
NC	Cumberland County												
NC	Department of Transportation												
NC	City of Durham												
NC	Durham County												
NC	City of Elizabeth City												
NC	City of Fayetteville												
NC	Town of Garner												
NC	City of Goldsboro												
NC	Granville County												
NC	City of Greensboro												
NC	City of Greenville												
NC	Town of Holly Springs												
NC	Hyde County												
NC	City of Jacksonville												
NC	City of Kannapolis												
NC	Mecklenburg County												
NC	Town of Kernersville												
NC	Town of Mooresville												
NC	New Hanover County												
NC	Person County												

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
NC	City of Raleigh												
NC	City of Rocky Mount												
NC	Town of Stem												
NC	Town of Surf City												
NC	City of Wilmington												
NC	Wake County (utility and funding concept for on-site wastewater management utility)												
NH	City of Concord												
NH	City of Manchester												
NH	City of Rochester												
NV	City of Reno												
OH	City of Akron												
OH	City of Dayton												
OH	City of East Liverpool												
OH	Hamilton County												
OH	City of Lakewood												
OH	Northeast Ohio Regional Sewer District												
OH	City of Riverside												
OK	City of Chickasha												
OR	City of McMinnville												
PA	Borough of Carlisle												
PA	Capital Region Water												
PA	Lower Paxton Township												
PA	City of Meadville												
PA	City of Mount Lebanon												
PA	Pittsburgh Water and Sewer Authority												
PA	Philadelphia Water Department												

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
RI	City of Newport												
RI	City of Providence												
SC	City of Beaufort												
SC	Beaufort County												
SC	Town of Bluffton												
SC	City of Columbia												
SC	City of Georgetown												
SC	Georgetown County												
SC	City of Greenville												
SC	Town of Hilton Head Island												
SC	Horry County												
SC	Town of Port Royal												
SC	Richland County												
SC	City of Tega Cay												
TN	City of Clarksville												
TN	City of Columbia												
TN	Knox County												
TN	City of Maryville												
TN	City of Morristown												
TN	City of Nashville												
TN	Metropolitan Government of Nashville and Davidson County												

State	Client	Utility/Funding Feasibility	Utility Implementation	Financial Plan	Cost-of-Service Study	Rate Study	Rate Structure Analysis	Program/Organizational Assessment	Credit/Incentive Program Development	Program Development (Including Stormwater Regulations)	Consulting on Changes to Existing Fee to Increase Defensibility	Software	Stormwater Impact Fee
TN	City of Spring Hill												
TX	City of Copperas Cove												
TX	City of Corpus Christi												
TX	City of Dallas												
TX	El Paso Water Utilities												
TX	City of Fort Worth												
TX	City of Hudson Oaks												
TX	City of Manor												
TX	City of Round Rock												
TX	City of Stephenville												
UT	Salt Lake City Public Utilities												
VA	Arlington County												
VA	City of Danville												
VA	City of Richmond												
VA	City of Virginia Beach												
VT	City of South Burlington												
VT	City of Essex Junction												
WA	City of Liberty Lake												
WA	City of Tacoma												
WA	City of Kirkland												
BC	City of Vancouver												
AB	City of Calgary												

D. KEY PERSONNEL

Jennifer Tavantzis

PROJECT MANAGER

Vice President



PROFILE

Jennifer has a strong background in water resources and utility management and possesses extensive data management and analytical skills. Her educational background lies in the areas of water quality, hydrology, and resource conservation. In her ten years with Raftelis, she has consulted with numerous local governments on projects related to stormwater program development and review, and stormwater utility feasibility, development, implementation, and reorganization studies. Jennifer has also worked with water and sewer utilities on a wide variety of projects - from rate development and affordability analysis to revenue loss investigations - all with the common thread of being driven by existing utility data and designed to positively impact utility performance and management. Jennifer has worked extensively with GIS data and systems and with relational databases in association with water, wastewater, and stormwater utility projects. In addition to her analytical work, she has a strong knowledge of municipal finance, and serves as a Municipal Advisor Representative, which ensures her fiduciary responsibility to clients. Jennifer was also a contributing editor of the WEF's *Manual of Practice No. 27: Financing and Charges for Wastewater Systems*.

KEY PROJECT EXPERIENCE

Boulder County (CO): Stormwater Utility Feasibility Study

Jennifer serves as the project manager in an engagement with Boulder County, CO as it evaluates the feasibility of establishing a stormwater utility and fee. In the first phase of the project, Jennifer worked with two engineering subconsultants to document the current stormwater management program and gap analysis, and oversaw data development, financial planning and ratemaking. She assisted the County with internal and external communications and establishing policies and processes around billing and customer service. The County is currently considering implementing the fee.

Pittsburgh Water and Sewer Authority (PA): Stormwater Utility Implementation and Program Support

Pittsburgh Water and Sewer Authority (PWSA) engaged Raftelis to provide a broad set of services related to water, sewer, and stormwater financial planning, ratemaking, and support for PUC proceedings. As part of this set of services, Raftelis assisted PWSA with all aspects of stormwater utility implementation, including development of a stormwater billing information management software, impervious area data and parcel-to-account relationships, billing policies and processes, credit program, customer outreach materials and website content. Jennifer played a critical role in all these areas. She also served as the primary trainer to customer service, engineering, and management staff on stormwater utility implementation, data maintenance, and use of the new software tool. Trainings were so well received that she and her team have been invited to provide more trainings as part of PWSA's recent CIS conversion project. Jennifer continues to support PWSA with stormwater utility administration when needed. She is also supporting PWSA in the upcoming PUC proceedings.

Specialties

- Stormwater finance & utility development
- Management policy & practice
- Utility rate studies
- Stakeholder engagement
- Organizational assessments

Professional History

- Raftelis: Vice President (2024-present); Senior Manager (2022-2023); Manager (2018-2021); Senior Consultant (2016-2017); Consultant (2013-2016); Associate Consultant (2012-2013)
- Colorado Department of Public Health & Environment (2011-2012)

Education

- Master of Environmental Management - Duke University (2011)
- Bachelor of Arts in Environmental Studies & Urban Planning - University of Richmond (2009)

Certifications

- Series 50 Municipal Advisor Representative

City of Greeley (CO): Stormwater Billing Data and Data Maintenance Process Audit

The City of Greeley (City) engaged Raftelis to conduct an audit of its stormwater billing data, to supplement ongoing water, sewer, and stormwater ratemaking and financial planning. Jennifer served as a subject matter expert, advising the project team in analyses, recommendations, and next steps. Based on our audit, the City has a framework for reviewing and adjusting, where appropriate, stormwater fee inputs, and is implementing a new set of processes to manage and maintain data related to stormwater billing.

Arlington County (VA): Stormwater Utility Feasibility Study and Implementation

Raftelis has long served as Arlington County's water and sewer utility rate advisor. In 2019, the County also asked Raftelis to evaluate the feasibility of funding their stormwater program through a user fee (more closely aligned with properties' impacts on the drainage system and program) instead of the existing tax rate. Jennifer played an integral role in the analysis, presentation of results to staff and leadership, and development of rate structure and rate recommendations. Key to this analysis was detailed consideration of the impacts owners and tenants of different styles of residential properties throughout the County. At present, the County is implementing the fee. Jennifer is overseeing aspects of the project, including data maintenance software development, financial modeling, and process development.

City of Manor (TX): Stormwater Utility Feasibility Study and Implementation

The City of Manor (City) has relied on Raftelis for water and sewer financial planning efforts, and recently engaged Raftelis in a stormwater fee feasibility study to assess the financial needs of its growing stormwater program and evaluating the feasibility of a fee as the most appropriate funding mechanism. Jennifer serves as project manager for this effort. To date, she has coordinated and overseen a comprehensive review of all current operating and capital costs, specifically identifying and quantifying costs related to existing stormwater program elements, which primarily relate to MS4 compliance. She has facilitated meetings with City staff in which a future desired program and level of service was established. Jennifer serves as subject matter expert and is overseeing development of a flexible financial planning and rate model that will allow the City to consider different stormwater rate structures. Customer impacts, as shown in the model, will inform next steps toward outreach and possible fee implementation.

City of Raleigh (NC): Stormwater Utility Financial Planning

Raftelis was engaged by the City of Raleigh to provide financial planning and modeling support for the City's stormwater utility. Jennifer oversaw model development and helped the City successfully transition to using the new model for internal financial planning and budgeting purposes. Raftelis worked with Stormwater program staff to begin planning for revenue bond issuance within 10 years and modeled multiple capital funding scenarios within the financial model to support the debt funding approach. Jennifer and the Raftelis team are currently reviewing the City's credit program, reviewing and supporting efforts to operationalize equity, and continuing to support the stormwater program with strategic communication, financial model updates, and other activities.

City of Burlington (NC): Stormwater Utility Rate Structure Update

Jennifer currently serves as the project manager for a stormwater fee rate structure update project for the City of Burlington (City). Raftelis has partnered with WK Dickson to provide stormwater program planning and level of service review, and Jennifer is overseeing data and rate model development, communications and outreach, and general project management tasks. The effort began in early 2021, and rate structure alternatives are currently under review.

Western Intake Partnership (NC): Regional Water Supply Project Financial Analysis and Implementation Support

Jennifer served as an analyst of economic feasibility and financial impacts for a group of four jurisdictions, the Western Intake Partnership, as they plan for long-term water supply solutions. Each jurisdiction varies in its growth projections, near- and long-term needs for enhanced water supply, alternative water supply options, and customer base, and as such, the financial implications of embarking on a joint venture varied from one partner to the next. In the project's early stages, Jennifer and the Raftelis team built a model and facilitated data gathering and output review meetings to establish a project timeframe optimal for the partnership. As the group moved forward with the project on that timeframe, Raftelis was engaged again to facilitate decision-making around project and partnership governance as well as establishing a fair approach to capital project and ongoing operations funding. At this stage the decisions are being incorporated into interlocal agreements that will govern the next phase of project execution.

Town of Lexington (MA): Stormwater Utility Feasibility Study and Implementation

The Town of Lexington (Town) engaged Raftelis, in partnership with Tighe & Bond, to implement a stormwater enterprise fund and fee. The Town has been funding stormwater management through ad valorem tax revenue. To date, the program has been fairly well funded, but a new, stable, and sufficient approach to funding is needed as the Town looks toward costly water quality requirements focused on phosphorus reduction in the coming years. Jennifer serves as the project manager for Raftelis' role – financial modeling, rate structure and rate analysis. Jennifer recently presented to the Town's Select Board, and the project is continuing to the next phase of refining billing policies and determining the technical details of implementation.

City of Philadelphia (PA): Water Department Management Assessment, Customer Assistance Program Implementation

Based on an intimate knowledge of the City's utility billing system and related practices and policies from a prior management audit, Raftelis was further engaged in 2016 to develop and implement a cutting-edge affordability program consistent with direction from a recent rate case and a recently passed legislation out of City Council. Jennifer was involved in the Tiered Assistance Program (or TAP) from the outset, playing a significant role in development of program requirements and facilitation of policy and process design. She trained customer service staff on the new program, including program features, but also new software, processes, and procedures put in place to support it. Early on, Jennifer oversaw much of the reporting developed to track key program metrics and drive program administration, and she continues to manage program reporting, well into the eighth year of the program being live. Jennifer has recently led efforts to document program challenges and successes at the five-year mark, which included extensive benchmarking of peer or geographically relevant assistance programs and recommendations to be leveraged in strategic planning efforts that are anticipated in the near future. In addition to work with TAP, Jennifer continues to oversee annual financial reporting (based on full copies of the billing system), to support financial planning efforts.

City of Durham (NC): Water and Sewer Rate Study, Stormwater Replacement Fund Policy Analysis

The City of Durham's development standards require that, in some circumstances, new development and redevelopment must include the installation of a Stormwater Control Measure (SCM), and contribute toward a Stormwater Replacement Fund, which was created as a means of ensuring financial guarantees are provided in perpetuity and that stormwater facilities around the City are able to be reconstructed or repaired after natural disasters or other catastrophic events. The City engaged Raftelis to evaluate the policies around fund contribution by projecting costs over time considering the vulnerability of Stormwater Control Mechanisms (SCMs) to extreme weather events. Jennifer developed a comprehensive Monte Carlo simulation model to determine the optimal fund balance and recommend contribution policies for future development.

Town of Holly Springs (NC): Stormwater Utility Stormwater Rate Structure Analysis and Rate Study

Raftelis worked with Brown and Caldwell on a stormwater program level of service review and rate structure update in the Town of Holly Springs (Town). Prior to this project, the Town had a stormwater fee rate structure that had begun to diverge with the industry standard and was not generating revenue sufficient to fund its growing stormwater management program. Jennifer worked closely with project partners and City staff to document the costs of providing multiple levels of service for the program and assess the rate impact to existing ratepayers with several reasonable rate structure options. Jennifer presented the alternatives and offered recommendations to elected officials at a working retreat. She then led the implementation of the recommended rate structure and rates, working closely with Town utility billing staff, GIS staff, and others involved in data creation and maintenance. The rate structure was successfully updated in early 2021.

Northeast Ohio Regional Sewer District (OH): Stormwater Utility Development and Implementation

The Northeast Ohio Regional Sewer District (NEORS) in Cleveland, OH provides wastewater service to over 50 communities in the region. In early 2013 it began billing for stormwater service to the entire region as well. Raftelis worked with the District through every step of the stormwater utility design and implementation process. Jennifer developed policy documentation for the utility's data management, customer service, credit program, inspection and maintenance program, and billing. In addition, Jennifer assisted with GIS data analysis, billing database development, and project management. Jennifer continued to provide post go-live support for many years.

Upper Falls Watershed Multi-Jurisdictional Stormwater Utility (NC): Stormwater Utility Implementation, Stormwater Services Manager

Five jurisdictions in the Falls Lake Watershed of Central North Carolina (County) engaged Raftelis to address pressing stormwater management issues across the region through the implementation of a coordinated stormwater funding mechanism. Raftelis worked with the jurisdictions to create a rate structure that would most appropriately and feasibly fund the planned level of service provision. Raftelis worked with each jurisdiction to determine the current and future costs associated with stormwater services and to set rates. Raftelis also assisted the jurisdictions in coordinating service activities for maximum cost savings. Raftelis developed the utility billing data for each jurisdiction, assisted them with determining the best billing and collection method (County tax bill line item), and coordinated with the County tax offices to implement the billing methodology. Raftelis also worked with the jurisdictions to develop a credits policy, as well as assisting them with extensive public and elected board meeting support and customer service representative training. The project involved complex governance, service provision, rate structure, and billing policy issues. Jennifer was involved in many aspects of complex policy development around rate structure, organizational structure, customer outreach, and other issues, and currently serves as the Stormwater Utility Services Manager to the five jurisdictions.

Carlisle Borough (PA): Stormwater Utility Feasibility Study and Implementation

Raftelis was engaged by the Borough of Carlisle (Borough) to provide assistance in assessing the financial needs of its growing stormwater program and evaluating the feasibility of a fee as the most appropriate funding mechanism. Jennifer served as project manager during this successful effort. Jennifer coordinated and oversaw a comprehensive review of all operating and capital costs, specifically identifying and quantifying costs related to existing stormwater program elements, which at that time were primarily categorized as Streets-related costs. Jennifer was also the primary developer of a flexible financial planning and rate model. Subsequent to the feasibility study, Raftelis was engaged by the Borough to implement the stormwater fee based on implementation and data maintenance considerations and recommendations made during the feasibility phase. After a great deal of outreach led by Raftelis, the Borough implemented the new utility fee in 2019.

City of Vancouver (BC): Healthy Waters Plan Financial Modeling and Support

The City of Vancouver, BC is developing a large-scale, long-range approach to adapt and improve sewage and rainwater management in the City's five basins – the Healthy Waters Plan. As part of a complex team led by Brown & Caldwell, Raftelis is providing financial planning and support throughout the phases of the project, from establishing baseline conditions to providing key inputs to a multi-criteria decision analysis exercise, and ultimately to developing a long-term financial planning tool that will allow the City to track and plan for ongoing system operation and extensive upgrades to support compliance with regulatory requirements and adaptations necessitated by climate change. Jennifer is leading this effort for Raftelis, coordinating with the project team and working closely with the City's technical working group.

PROJECT LIST

- Adams County (CO) – Stormwater fee credit program review
- Arlington County (VA) – Stormwater utility feasibility study
- City of Baltimore (MD) - Stormwater utility implementation
- Beaufort County (SC) - Multi-jurisdictional stormwater rate structure analysis and rate study
- City of Burlington (NC) - Stormwater utility rate structure update
- Boulder County (CO) – Stormwater utility feasibility study
- Borough of Carlisle (PA) – Stormwater utility feasibility study and implementation
- City of Concord (NH) – Stormwater utility feasibility study
- City of Creedmoor (NC) – MS4 permit compliance support
- City of Charlotte/Mecklenburg County (NC) - Stormwater utility data and policy update
- City of Dallas (TX) - Stormwater program review and update
- City of Durham (NC) - Water and sewer rate study; stormwater replacement fund policy analysis
- Durham County (NC) – Stormwater utility feasibility study and implementation
- DC Water (DC) – Customer assistance analysis
- City of Fayetteville (NC) – Stormwater program evaluation; ordinance and administrative manual update
- Town of Greeley (CO) – Stormwater billing data and data maintenance process audit
- Town of Holly Springs (NC) – Stormwater utility stormwater rate structure analysis and rate study
- City of Jackson (MS) - Water utility billing data review and process assessment
- Town of Kernersville (NC) - Stormwater program strategic planning
- City of Lakewood (OH) – Impervious area charge implementation
- Town of Lexington (MA) – Stormwater utility feasibility study and implementation
- Town of Longmeadow (MA) – Stormwater utility feasibility study and implementation
- Lower Paxton Township (PA) - Stormwater utility feasibility study and implementation
- City of Manor (TX) - Stormwater utility feasibility study
- City of Marathon (FL) – Stormwater utility rate structure update
- Modesto Irrigation District (CA) - Drainage maintenance cost allocation study
- Town of Mooresville (NC) - Stormwater utility feasibility study and implementation
- Town of Mount Pleasant (SC) - Cost-of-service study
- City of Newport News (VA) - Water utility rate study and affordability analysis
- Town of North East (MD) – Stormwater utility implementation
- Northeast Ohio Regional Sewer District - Stormwater utility development and implementation
- City of Philadelphia (PA) - Water department management assessment; customer assistance program implementation
- Pittsburgh Water and Sewer Authority (PA) – Stormwater utility implementation
- City of Raleigh Public Utilities Department (NC) - Stormwater utility organizational assessment & benchmarking study

- City of Raleigh (NC) – Stormwater utility financial planning
- Village of Rantoul (IL) – Stormwater billing software development
- City of Richmond (VA) - Rate study impact analysis
- City of Sacramento (CA) – Stormwater rate structure review and rate study
- San Diego County (CA) – Stormwater funding analysis
- City of San Jose (CA) – Stormwater funding analysis
- Sewerage and Water Board of New Orleans (LA) - Rate study; fee-in-lieu study
- Suffolk County (NY) – Countywide Sewer District Map & Plan Report support
- City of Treasure Island (FL) – Stormwater utility rate structure update and credit policy
- Upper Falls Watershed Multi-Jurisdictional Stormwater Utility (NC) – Stormwater utility implementation; stormwater services manager
- Town of Westford (MA) – Stormwater utility feasibility study and implementation
- Western Intake Partnership (NC) – Financial analysis on long-term multi-jurisdictional water intake and treatment project
- City of Vancouver (BC) – Healthy Waters Plan Financial Modeling and Support

Peter Purdy PE, MBA

LEAD ANALYST Manager

ROLE

Peter will serve as the Lead Consultant and will work at the direction of Jennifer in conducting analyses and preparing deliverables for the project.

PROFILE

Peter has over 10 years of experience in civil engineering and municipal financial consulting. He has worked on a variety of stormwater utility fees from feasibility through development and implementation. Additionally, he has worked on numerous water and wastewater rate studies and impact fee studies, helping utilities achieve fair and equitable rates that help fund their current and future financial needs.

With previous experience working in land development and civil engineering, Peter is able to understand many of the growth challenges facing municipalities and can help communicate important information to various stakeholders.

KEY PROJECT EXPERIENCE

City of Wheat Ridge (CO): Stormwater Utility Feasibility Study

Upon completion of a comprehensive stormwater needs assessment study, the City of Wheat Ridge (City) engaged Raftelis to conduct a stormwater utility feasibility study, to evaluate the feasibility of establishing a fee and funding an greatly enhanced program with the new revenue stream. Peter led the financial analysis, developing a comprehensive model to evaluate rate and rate structure scenarios and working with the City to determine a path forward on a very short timeline.

City of San Angelo (TX): Stormwater Financial Planning and Rate Study

As part of a broader water, sewer, and stormwater rate study, Peter supported rate structure alternative evaluations and rate recommendations for the City's existing stormwater fee, as well as a separate drainage fee, focused on funding necessary capital investments. Peter gathered and evaluated data, developed a financial model, and worked with the City along the way to refine the financial plan and develop a rate structure and rates supportable by City leadership.

City of Wilmer (TX): Stormwater Utility Fee Study

At a previous firm, Peter led the stormwater utility fee study for the City of Wilmer. The City is located just south of Dallas with a population of approximately 6,000. The area has experienced a boom in commercial development in the last decade with many large warehouse buildings being built and putting strain on the City's stormwater system. As a basis for this study, residential sampling was performed as well as manual delineation of all impervious area on commercial property. The City was particularly interested in making sure that the fee would be affordable for it's



Specialties

- Stormwater utility fee studies
- Water/wastewater rate studies
- Credit analysis for impact fee studies

Professional History

- Raftelis: Manager (2025-present)
- Freese and Nichols: Infrastructure Management Consultant (2022-2025)
- LJA Engineering: Project Manager (2020-2022); Assistant Project Manager (2017-2018); Graduate Engineer (2013-2017)

Education

- Master of Business Administration - Texas A&M University (2019)
- Bachelor of Science in Civil Engineering - Texas Tech University (2012)
- Bachelor of Science in Architecture - Texas Tech University (2012)

Professional Registrations

- Professional Engineer, TX, #126254 (2017)

Certifications

- Institute of Asset Management Certificate

residents, many of whom are at or below the poverty line, while at the same time making sure that enough revenue was generated from commercial development to cover their increased stormwater program costs.

City of Midwest City (OK): Stormwater Utility Fee Study

At a previous firm, Peter managed the stormwater utility fee study for the City of Midwest City. The City is a suburb of Oklahoma City and originally boomed due to their proximity to Tinker Air Force Base in the 1940s. Because of this, the City has a significant amount of aging infrastructure while at the same time is dealing with flat population growth. The City decided to investigate a stormwater utility fee as a way to raise revenue to pay for their existing capital and O&M needs. The initial feasibility study and impervious area delineation work was presented to City Council who voted in favor of adoption and implementation. Peter worked on the implementation of the fee as well, coordinating the data needs of the City's billing vendor and finalizing a rate structure that struck a balance between fairness for customers and ease of administration for the City.

Town of Wake Forest (NC): Stormwater Utility Fee Study

At a previous firm, Peter led the stormwater utility fee development for the Town of Wake Forest. The Town was particularly interested in engaging the community in the development of their stormwater fee, so after determining the revenue requirements and units of service, the Town requested a citizen advisory group to help develop fee options and provide recommendations to the Board of Directors. This committee was made up of various community members, chosen to represent specific groups like business owners, developers, and senior citizens and it met once a month over a 5 month period to explore the stormwater utility fee. Peter created the presentations and the information that was used to facilitate these meetings as well as developing an interactive fee model that each of the members was able to utilize to develop their own fees. Ultimately, the citizen advisory group decided to recommend the highest funding option so they could tackle their CIP projects more quickly, and their Board adopted that fee. Peter oversaw the billing integration with the county tax offices and provided training and documentation for data maintenance going forward.

PROJECT LIST

- City of Bedford (TX) – Stormwater Utility Fee Audit
- City of DeSoto (TX) – Stormwater Utility Fee Study and Implementation
- City of Frisco (TX) – Stormwater Utility Fee Update
- City of Irving (TX) – Roadway, Water, Wastewater and Drainage Impact Fee Study
- City of Krum (TX) – Water and Wastewater Rate Study
- City of Rowlett (TX) – Stormwater Utility Fee Study and Implementation
- City of Wilmer (TX) – Stormwater Utility Fee Study and Implementation
- City of Lawton (OK) – Water and Wastewater Rate Study, Stormwater Utility Fee Study
- City of Midwest City (OK) – Stormwater Utility Fee Study and Implementation
- City of Midwest City (OK) – Wastewater CIP Fiscal Analysis
- City of Galveston (TX) – Water and Wastewater Rate Study
- City of Sugar Land (TX) – Stormwater Utility Fee Study and Implementation
- New Braunfels Utilities (TX) – Water, Wastewater, and Electric Rate Study

Aaron Worley

ANALYST Consultant

ROLE

Aaron will work at the direction of Jennifer in conducting analyses and preparing deliverables for the project.

PROFILE

Aaron has experience in working on program implementation, working with large datasets, and working in the government consulting setting. During his time with Deloitte, Aaron worked on software implementation projects that modernized how state governments administered their welfare programs. During his time at UNC-Chapel Hill, Aaron focused his coursework on Environmental Studies, where he also spent time conducting research that focused on how governments could improve their approach to hazard mitigation preparedness. As a consultant with Raftelis, Aaron has served on several projects performing a variety of tasks related to financial modeling, impervious area analysis, benchmarking, rate development, and cashflow tracking tool development.

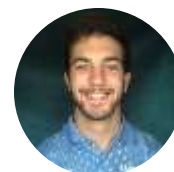
KEY PROJECT EXPERIENCE

City of Dayton (OH): Capital Improvement Program

Raftelis is currently assisting the City with implementing new processes and procedures, including a cash flow target spending plan, spending and schedule variance reports, and master program schedule, to ramp up capital delivery for Dayton Water to implement the recommended projects in the water and wastewater master plans. Aaron developed an excel-based tool that tracked the monthly planned, actual, and year-to-date spending of over 200 capital projects across 5 service areas. The tool consisted of individual project tabs, summary tables, and annual spending dashboards that enabled project managers and supervisors to efficiently track project progress and spending against the planned schedule and budget. In addition to individual project tabs tracking the planned and actual monthly spending and year to date spending, each tab also contained a monthly spending report template that automatically populated with information entered into the monthly tracking table which expediated the project reporting process to project supervisors. Aaron also contributed to the development of a Microsoft Project-based master program schedule that tracked project dates, duration, and spending for the City of Dayton to use during the capital project planning process.

City of Stephenville (TX):

The City of Stephenville, Texas (City) engaged Raftelis in 2024 to complete a Stormwater Fee Rate Study of the City's existing stormwater fee and assess alternative rate structures that would sufficiently fund the City's stormwater utility. Raftelis helped the City evaluate its stormwater program cost drivers and identify three enhanced level of service (LOS) options to expand operating and maintenance resources and capital investment in the City's stormwater program. To provide alternatives for how to fund the increased LOS, Aaron conducted an Equivalent Residential Unit (ERU) analysis to develop an updated ERU based on impervious area, as opposed to the City's existing gross area-based ERU, that was used in the development of rate structure alternatives that were evaluated for their equitability and efficacy at recovering costs of the stormwater program. Aaron built an interactive financial



Specialties

- Program implementation
- Data analysis
- Writing

Professional History

- Raftelis: Consultant (2025-present); Associate Consultant (2024)
- Deloitte: GPS Analyst (2022-2024)

Education

- Bachelor of Arts in Environmental Studies and History - University of North Carolina at Chapel Hill (2021)

Certifications

- Group 2 Social & Behavioral Research (CITI Program)

model to allow the City to evaluate 3 different levels of service and 2 different rate structure options over 5 years, including different options for staffing allocations, operations and maintenance costs, debt funding, and annual capital spending. In September 2024, the City adopted a rate structure based on estimated impervious area, using the Raftelis developed ERU.

City of Liberty Lake (WA): Stormwater Master Plan – Rate Study

In 2024, Raftelis served as a subconsultant to Parametrix to complete a financial review for the City of Liberty Lake, WA (City) stormwater program. Aaron supported the financial review by creating an interactive financial model that included current and projected stormwater program costs and revenue offsets to derive a revenue requirement that was later used to calculate recommended rates that would help the City grow their stormwater fund balance. The model was developed to allow the City to adjust costs for future years as new costs become realized to allow for the City to derive an accurate annual revenue requirement. Aaron also built in a cashflow tab that tracked the annual fee revenue, stormwater program expenditures, and stormwater fund balance through FY 2040 for the City could leverage during budget planning discussions during the 15-year planning period.

City of Seattle (WA): Solid Waste Benchmarking Study

Seattle Public Utilities (SPU) is tasked with managing the City of Seattle's water and waste resources to promote the well-being of its residents, the environment, and the local economy. SPU manages a wide range of essential services for Seattle's 1.4 million residents, including Solid Waste Management, which encompasses collecting, transferring, processing, and disposing of garbage, recycling, compost, and other waste materials generated by residential, multifamily, commercial, and self-haul customers. Raftelis is currently working with SPU on a Solid Waste Benchmarking Research and Report that will help SPU decrease the waste stream, decrease garbage can size, and respond to expected changes in housing density. This report uses benchmarking and best practices in order to help SPU develop specific strategies and programs to meet its goals. Topics covered include bulky and special waste, waste management for increased urban density, managing waste at special events, trash compaction, and transparent customer billing.

PROJECT LIST

- City of Manor (TX) – Stormwater Financial Planning and Rate Study
- City of San Angelo (TX) - Stormwater Financial Planning and Rate Study
- City of Pittsburgh (PA) – Software testing and functional design planning
- City of Philadelphia (PA) – Software testing
- Georgetown County (SC) – Stormwater Financial and Program Development
- City of Providence (RI) – IA estimation
- City of Lawrence (MA) – IA estimation
- City of Seattle (WA) – Solid Waste Benchmarking Study
- City of Albemarle (NC) – Solid Waste Benchmarking Study
- City of Black Mountain (NC) – Stormwater Financial Planning and Rate Study

OTHER RELEVANT EXPERIENCE

Deloitte: Louisiana Integrated Eligibility Project (2023-2024)

Deloitte worked with the Louisiana Department of Children and Family Services to deliver an integrated eligibility software solution that would modernize the way that state would administer their welfare benefits. Aaron worked on the project as a functional lead where he oversaw several aspects of the software development life cycle by facilitating design meetings with state workers, conducting system testing and communicating design requirements to developers, and training end-users on how to use the new system.

E. ORGANIZATIONAL STRUCTURE

Organizational Structure

OUR TEAM OF CONSULTANTS SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S PROJECT.

Our team includes senior-level professionals to provide experienced project leadership with support from talented consultant staff. This close-knit group has frequently collaborated on similar successful projects, providing the City with confidence in our capabilities.

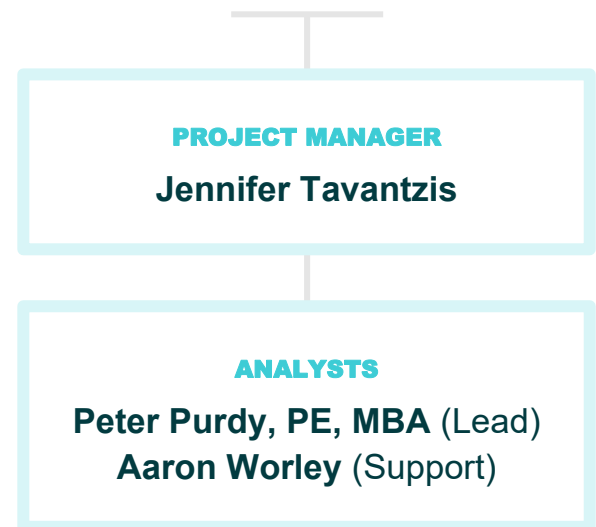
Here, we have included an organizational chart showing the structure of our project team. On the following pages, we have included resumes for each of our team members as well as a description of their role on the project.

AVAILABILITY

With the depth of more than 190 consulting professionals, and specifically the current and anticipated workload of the individuals assigned to this project, we have the availability to provide the requested services in a timely and efficient manner to meet the scheduling requirements and objectives of the City. As a rule, Raftelis operates at a company-wide project utilization of approximately 65% to 75%. This level of utilization, which we expect to continue through the proposed timeline of this project, will provide the project team with ample time to allocate to the City's engagement.

Raftelis actively manages the distribution of our staff hours to ensure we allocate the necessary resources to meet the needs of each of our clients. Raftelis' executive and management team participate in a weekly conference call to review the number of consulting hours required to meet the needs of our clients during the upcoming week. This weekly meeting allows our project managers to deploy our consulting staff in a flexible manner that ensures a suitable level of hours will be devoted to each client.

City of Wyoming



Team Member	Role	Percentage of Availability
Jennifer Tavantzis	Project Manager	10%
Peter Purdy	Lead Analyst	25%
Aaron Worley	Analyst	40%

TEAM MEMBER ROLES AND RESPONSIBILITIES

Jennifer Tavantzis: Project Manager

Jennifer will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. She will also lead the consulting staff in conducting analyses and preparing deliverables for the project. Jennifer will serve as the City's main point of contact for the project.

Peter Purdy: Lead Analyst

Peter will serve as the Lead Consultant and will work at the direction of Jennifer in conducting analyses and preparing deliverables for the project.

Aaron Worley: Analyst

Aaron will serve as the Analyst and will work at the direction of Jennifer in conducting analyses and preparing deliverables for the project.

F. PROJECT APPROACH/WORK PLAN

Project Understanding

In order to expand the City's ability to provide stormwater service to its residents and prepare for the future, the City wishes to update rates so that additional revenue can be recovered and the City can, therefore, continue to sufficiently fund the stormwater utility while maintaining revenue reserves. Currently, the City charges for a stormwater fee using a residential equivalent factor (REF) that is correspondent to the land use classification of the parcel. Each single-family parcel is charged for 1 unit, while other parcels have their own REFs based on the ratio of runoff associated with that land use class compared to the residential class. Each non-single-family residential parcel is then charged based on the REF of their land use class multiplied by the net acreage of the parcel and the base rate for stormwater fees, yielding the quarterly rate. Due to growth within the City and a desire to maintain reserves that the utility can depend upon if needed, establishing new rates that equitably recover costs now and into the future is necessary.

Raftelis can help in this effort through the project approach described in the following, which includes the major tasks of project initiation, revenue requirements, financial plan development, rates and scenarios, recommendations, and reporting and presentations as well as an optional task of a data and billing audit.

Project Approach

Task 1: Project Initiation and Stormwater Utility Workshop

A well-planned and comprehensive project initiation meeting sets the stage for efficient data gathering, thorough analysis, and effective communication throughout the project. Due to the accelerated schedule required for this project, Raftelis proposes changing from a standard kickoff meeting to a 3-day in-person stormwater utility workshop. Raftelis will schedule this workshop as early as possible and believes it will provide a forum to fast-track discussions with the City's Project Management Team (PMT) and ensure we have a clear understanding of the City's objectives.

Prior to the stormwater utility workshop, Raftelis will provide the City with a draft information request that lists the information needed to complete the analyses associated with the stormwater utility rate study. At the workshop, we will discuss the data already received as well as any outstanding requests. We also plan to cover some key technical topics so we have a starting point for model development. Among the items Raftelis intends to discuss are:

- Financial sufficiency and sustainability
- Administrative costs
- Revenue reserves
- Scenario development

At this meeting, we will refine the schedule for subsequent meetings and deliverables.

PLANNED MEETINGS:

- Stormwater utility workshop

DELIVERABLES:

- Data request list; meeting summary

Task 2: Revenue Requirements

Raftelis will begin project work by documenting current and projected future operations and maintenance (O&M) costs, along with any capital, billing, collection, administrative, and general costs, for the stormwater utility based on financial data provided to us by the City. These costs will be estimated for the five-year study period and will be escalated according to planned changes to service delivery or utility administration. For traditional water and sewer rate studies, Raftelis commonly considers including the apportionment of costs to maximum day and hour demands, fixed costs for meter calculations, and utilization of specific rates for peak to average demands for customer classes as described in the RFP. For the requested stormwater rate study, we will evaluate the cost of service related to applicable factors such as property type and development characteristics.

Data Collection

To begin the analysis for this study, Raftelis will collect financial data from the City regarding the City's historical stormwater revenue, costs to the program including administrative costs and personnel, O&M expenses, and infrastructure and capital improvement program funding requirements. This data will be requested and collected as early as possible and will immediately be utilized to develop the revenue requirements that are the basis of the funding needs.

Establishment of Revenue Requirements

Raftelis will develop forecasts of revenue requirements, such as annual costs related to personnel, O&M expenses, and capital expenditures over the five-year planning period. The financial forecast will incorporate annual budgets for asset renewal and replacement, other infrastructure replacement needs, and projects related to state and federal regulations, if any. We will utilize industry comparisons and benchmarks to help estimate replacement needs for those capital items for which the City does not have cost estimates. Additionally, we will evaluate the City's operating and capital cash reserve requirements and fiscal and rate policies and recommend appropriate changes to the existing policies, as warranted, that will allow the utility to most effectively meet its financial goals.

We will also review any other sources of revenue that will be used to offset the revenue requirements. This includes revenue from miscellaneous fees, interest income, and other transfers in, if applicable. Capturing these data will allow the utility to form a complete financial picture and minimize the rate increase where possible.

Raftelis recognizes that varying escalation or inflation factors will need to be incorporated into the financial plan to accurately estimate units of service and revenue require moving into the future. These costs escalate at different rates, and the financial planning model will account for these differences. As a key element to developing a five-year forecast of revenues and revenue requirements, we will evaluate the forecasting methods and any models currently used by the City to ensure that future use of the methods and models will adequately project revenue requirements and rates over the planning period.

In developing appropriate escalation and inflation factors, we will consider historical trends along with state and national resources, such as the Engineering News Record, Construction Cost Index, the Producer Price Index for various commodities, the Bureau of Labor Statistics and the Consumer Price Index (CPI), and other published indices for projecting future expenses. Based on our extensive national experience, we will incorporate other known utility-specific factors that may drive up future costs. For example, benefit costs have been increasing at a rate significantly faster than that of the CPI. We will discuss these and other factors with staff to determine which are most appropriate. While the majority of costs in future years will be based on historical trends and inflationary factors, there may be some incremental O&M costs, such as increased personnel or electricity costs, that will be incorporated into the plans to achieve the highest forecast accuracy possible.

The forecast of revenue requirements will be prepared using a Microsoft Excel-based financial model that is built for the City. This model will be provided to staff at the completion of the project and is described in greater detail in Task 3.

Forecast of Revenues

Raftelis will prepare projections of base revenues from existing rates using data from the City's billing records with a breakdown of incremental revenues projected from any expected new collections and revenues from existing customers.

PLANNED MEETINGS:

- Stormwater utility workshop

DELIVERABLES:

- Preliminary model inputs; meeting summary

Task 3: Financial Plan Development

At the heart of any successful financial planning and rate study is the financial model that is used to develop revenue requirements, complete cost allocations, and calculate rates. The model must be sophisticated enough to perform the complex calculations involved in a comprehensive rate study yet contain user-friendly functionality to facilitate future updates by City staff without the need for extensive training.

As such, Raftelis will develop a customized Excel-based financial model that is tailored to the City's needs, user-friendly, and suitable for the City's future use as a financial planning and rate calculation tool. This model will be used to forecast costs and revenue, calculate the necessary rates to build and maintain revenue reserves, and display inputs and outputs visually using a dynamic dashboard. Additionally, it will calculate the initial rates required to meet the City's financial and service level goals and will function as a planning resource for the short-term future.

The financial planning portion of the model will be used to develop and forecast revenue requirements over the five-year planning period. It will include units of service forecasting, operating, capital, debt expense forecasts, and projection of any needed rate increases.

The cost allocation portion of the model will include calculations related to classifying the costs and allocating them to different customer classes. The rate design portion of the model will use the preferences determined during the preliminary rate design meeting as the foundation for calculating the rates for the existing structure and the alternative rate options. It will also present customer impacts by comparing existing and alternative customer bills of a small sample of customers. The model will provide a five-year schedule of rates (2026 to 2030) for consideration by the City.

These rates will be used to calculate indicators such as total operating revenue and expenses and will be combined with asset depreciation and the City's financial data to develop a statement evaluating the sufficiency of the updated rates.

Raftelis and City staff will collaborate on the development of the model throughout the course of the study such that staff will be familiar with many aspects and the functionality of the model prior to delivery. Raftelis will deliver a completely functioning model for the City's use at the end of the project.

PLANNED MEETINGS:

- Stormwater utility workshop

DELIVERABLES:

- Meeting summary (model to be delivered in final task)

Task 4: Rates and Scenarios

We will develop several funding scenarios for the City to consider within the financial planning model built in Task 3. A "business-as-usual" scenario where the current rates are maintained over the five- year period, resulting in the calculated baseline forecasted revenues from Task 2, will be modeled, and the resultant financial impacts will be calculated. This will illustrate the funding difference resulting from a steady rate and will show a significant impact on the revenue reserves the City wishes to build. Additional rate scenarios will be modeled based on discussions with the City regarding the desired level of service and the recommendations from Raftelis for revenue reserves. These scenarios will all work dynamically in the financial planning model to show the sufficiency of each. By including multiple scenarios, and by building them into a dynamic model, the impacts of each will be easily compared, yielding key indicators as well as dashboarding graphics to serve as these points of comparison.

Each scenario will utilize an accompanying rate to generate revenue with the purposes of achieving revenue sufficiency based on the revenue requirements developed by Raftelis in Task 2 and of building revenue reserves. The rates will be informed by discussions with the City's project management team regarding levels of service, comparisons to other utilities, and anticipated impacts on different customer classes.

Utilizing the information provided by the City regarding the infrastructure, operations and maintenance, administrative expenses, and population trends, Raftelis will develop specific recommendations for the City to maintain revenue reserves to allow the stormwater utility to remain sufficient in the future and prepare for potential unforeseen shortfalls.

PLANNED MEETINGS:

- Stormwater utility workshop

DELIVERABLES:

- Meeting notes

Task 5: Recommendations

Raftelis will develop recommendations for rates and reserve targets based on the discussion of scenarios with the PMT. Using the revenue requirements projected in the financial model, the recommended reserve levels, the escalation factors over the planning period, and the City's customer data, we will develop recommended rates according to the land use classes designated by the City. Raftelis will also develop recommendations for long-term asset replacement and renewal spending, in accordance with the City's asset management objectives. Rates will be calculated for the five-year period, and each year the rates will be sufficient to cover revenue requirements and comply with recommended and decided financial policies with the City's input. The sample of customer bills under each scenario referenced in Task 4 will also inform our recommendations.

Preliminary recommendations will be developed during the stormwater utility workshop. We will gather feedback from the City and get the team's buy-in before finalizing the recommendations in the report and presentation to the City Council.

PLANNED MEETINGS:

- Stormwater utility workshop

DELIVERABLES:

- Recommendations provided in final report

Task 6: Reporting and Presentations

Project Communication

In a project with a short timeline, it is crucial to communicate progress and expectations. To maintain clear and consistent communication with the program management team over the course of this project, Raftelis has outlined meetings and deliverables under each task. We will also provide regular updates on the progress of the project and respond to any questions or clarify anything that may have come up. Our team will be transparent and available to the project management team throughout the course of this project.

Presentation

Raftelis will prepare a presentation summarizing the results and recommendations of the rate study and virtually deliver the presentation at a City Council meeting. Feedback from this presentation will be incorporated into the final report.

Report

Raftelis will provide the City with a rate study summary report that highlights the financial plans, cost-of-service evaluations, and rate schedule recommendations. Once the draft summary report is completed, we will provide an electronic copy to the City for review and comment. A final report that incorporates comments from the City will also be prepared and provided.

PLANNED MEETINGS:

- City Council presentation

DELIVERABLES:

- Final model and final report

G. PROJECT SCHEDULE

Project Schedule

Raftelis will complete the scope of services within the timeframe shown in the schedule below, assuming the City provide information in a timeline manner and support the proposed meeting schedule. The proposed schedule assumes a notice-to-proceed by the end of October 2025 and Raftelis' receipt of needed data in a timely manner and be able to schedule meetings as necessary. Project completion is estimated for November 2025.

TASKS	Week of				
	10/27	11/3	11/10	11/17	11/24
1: Project Initiation and Stormwater Utility Workshop		●			
2: Revenue Requirements					
3: Financial Plan Development					
4: Rates and Scenarios					
5: Recommendations				●	
6: Reporting and Presentations				●	●

- *In-person Meetings*
- *Web Meetings*
- *Deliverables*

TASKS THAT WILL BE DONE BY THE CITY

Raftelis recognizes the challenges Wyoming staff face with their day-to-day responsibilities. Even though this project will require some effort from Wyoming staff, we will minimize the time and effort required by staff as much as possible by combining meetings and delivering materials for review with sufficient time for staff review. The areas where Wyoming staff time will be required are listed below:

- Participating in 3-day stormwater utility workshop
- Providing relevant data
- Participating in calls to discuss preferred approaches (i.e., financial plan and rate design workshop)
- Participating in calls to discuss preliminary results of each element
- Responding to questions
- Reviewing draft deliverables (i.e., reports and presentation packages)
- Participating in City Council meeting and workshops

We certainly welcome additional involvement of City staff, as we have found that client participation enhances the project outcome.

H. COST

Cost

The following table provides a breakdown of our proposed fee for this project. This table includes the estimated level of effort required for completing each task. Expenses include costs associated with travel and a \$10 per hour technology charge covering computers, networks, telephones, postage, etc.

Our scope of work includes the number of in-person and/or virtual meetings shown in the table below. Should the City require additional meetings or presentations to stakeholders, these can be arranged upon request at an added cost, which will be determined based on the scope and content of the meeting and/or presentation requested.

Tasks	Meetings		Hours				Total Fees & Expenses
	Virtual	In Person	Jennifer Tavantzis	Peter Purdy	Aaron Worley	Total Hours	
1: Project Initiation and Stormwater Utility Workshop		1	2	4	4	10	\$2,950
2: Revenue Requirements			2	8	4	14	\$4,170
3: Financial Plan Development			1	4	8	13	\$3,525
4: Rates and Scenarios			1	4	8	13	\$3,525
5: Recommendations	1		1	2	2	5	\$1,475
6: Reporting and Presentations	1		2	2	4	8	\$2,340
Total Meetings / Hours	2	1	9	24	30	63	–
Hourly Billing Rates	–	–	\$375	\$295	\$230	–	–
Total Professional Fees	–	–	\$3,375	\$7,080	\$6,900	–	\$17,355
Travel Expenses							\$0
Technology Fee							\$630
Total Expenses							\$630
Total Fees & Expenses							\$17,985

Jennifer Tavantzis – Project Manager

Peter Purdy – Lead Analyst

Aaron Worley – Analyst

I. EXCEPTIONS AND DEVIATIONS

Exceptions and Deviations

We request that the City consider making the following modifications, shown in red below, to the Professional Services Agreement. Please contact us if you have any questions or concerns about these modifications.

5. DOCUMENTS. The City shall be the owner of all documents, reports, studies, analysis and the like prepared by the Consultant in conjunction with this contract ~~and intended by Consultant as a deliverable hereunder. Nothing in the Contract Documents shall be deemed or construed as a waiver, release, transfer, assignment or divestiture by the Consultant of any of its intellectual property, know-how or trade secrets.~~

6. STANDARD OF CARE. Consultant shall exercise the same degree of care, skill, and diligence in the performance of the services as is ordinarily possessed and exercised by members of the profession under similar circumstances in Dakota County, Minnesota ~~as of the time the services are provided. Consultant may rely on all data and information provided by or on behalf of City to perform the services.~~ Consultant shall be liable to the fullest extent permitted under applicable law, without limitation, for any injuries, loss or damages ~~proximately to the extent~~ caused by Consultant's breach of this standard of care. City shall not be responsible for discovering deficiencies in the accuracy of Consultant's services. Consultant shall be responsible for the accuracy of the work and shall promptly make necessary revisions or corrections resulting from errors and omissions on the part of Consultant without additional compensation.

8. INDEMNIFICATION. The Consultant shall indemnify and hold harmless the City, its officers ~~agents~~, and employees, ~~of and from any and all~~ claims, demands, actions, causes of action, including costs and attorney's fees, ~~arising out of or by reason of from~~ the execution or performance of the work or services provided for herein to the comparative extent they are caused by Consultant's negligent acts or omissions or those negligent acts or omissions of persons for whom Consultant is legally responsible, ~~in the performance of services hereunder.~~

9. COPYRIGHT. Consultant shall defend actions or claims charging infringement of any copyright or patent, ~~by reason of to the extent~~ the use or adoption of any designs, drawings or specifications supplied by ~~them~~ Consultant (for the purpose provided), and ~~they~~ Consultant shall hold harmless the City from loss or damage ~~resulting to the extent caused~~ therefrom.

J. ADDITIONAL INFORMATION

Additional Information

Raftelis has provided pertinent information in the sections above.

K. REFERENCES

References

We urge you to contact the references listed below to better understand our capabilities and the quality of service that we provide.

City of Wheat Ridge CO

Reference: Eric Czaikowski, PE, Infrastructure Project Manager
P 303.205.7627 / E: eczaikowski@ci.wheatridge.co.us

City of Philomath WA

Reference: Michael A. Murzynsky, Finance Director
P: 541.929.9709 / E: mike.murzynsky@philomathoregon.gov

City of Greeley CO

Reference: Ryan LaFave, Business Analyst II
P: 970.590.8596 / E: ryan.lafave@greeleygov.com

Village of Wilmette IL

Reference: Michael Braiman, Assistant Village Manager
P: 847.853.7506 / E: braimanm@wilmette.com

Pittsburgh Water and Sewer Authority PA

Reference: Ana Bennett, P.E., Senior Project Manager, Wastewater, Stormwater, and Green Infrastructure
P: 412.255.8800 ext: 8035 / aflores@pgh20.com

CITY OF WYOMING PROPOSER WARRANTIES

APPENDIX B
CITY OF WYOMING PROPOSER WARRANTIES

- A. Proposer warrants that it is willing and able to comply with State of Minnesota laws with respect to foreign (non-state of Minnesota) corporations.
- B. Proposer warrants that it is willing and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts or omissions of any officers, employees or agents thereof.
- C. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City of Wyoming.
- D. Proposer warrants that all information provided in connection with this proposal is true and accurate.
- E. Proposer certifies that it can and will provide and make available, at a minimum, all services set forth in the "Scope of Services Requested" section of the City's request for proposals.

Signature of Official: 

Name (typed): Jennifer Tavantzis

Title: Vice President

Firm: Raftelis Financial Consultants, Inc. (DBA Raftelis)

Date: 10/10/2025