



TOWN COUNCIL MEETING
1777 N Meadowlark Dr, Apple Valley
Wednesday, September 17, 2025 at 6:00 PM

AGENDA

Notice is given that a meeting of the Town Council of the Town of Apple Valley will be held on **Wednesday, September 17, 2025**, commencing at **6:00 PM** or shortly thereafter at **1777 N Meadowlark Dr, Apple Valley**.

Mayor | Michael Farrar

Council Members | Kevin Sair | Annie Spendlove | Scott Taylor | Richard Palmer

Please be advised that the meeting will be held electronically and broadcast via Zoom. Persons allowed to comment during the meeting may do so via Zoom. Login to the meeting by visiting:

<https://us02web.zoom.us/j/82661513795>

if the meeting requests a password use 1234

To call into meeting, dial (253) 215 8782 and use Meeting ID 826 6151 3795

CALL TO ORDER

PLEDGE OF ALLEGIANCE

PRAYER

ROLL CALL

DECLARATION OF CONFLICTS OF INTEREST

MAYOR'S TOWN UPDATE & REPORTS, RECOMMENDATIONS, AND ANNOUNCEMENTS

PUBLIC COMMENTS: 3 MINUTES EACH - DISCRETION OF MAYOR FARRAR

DISCUSSION AND ACTION

- [1.](#) Ordinance O-2025-33, Proposed Zone Change, Open Space Transition Zone (OST) to Agricultural 10 Acres Zone (AG-10) for AV-1354-B, Applicant: Alan Dockstader.

*Planning Commission recommended approval on September 10, 2025.

- [2.](#) Resolution R-2025-21, Adoption of "Purchasing Card (P-Card) Policy.
- [3.](#) Audit Engagement Letter FY25.
- [4.](#) Request for Statement of Qualifications (SOQ).

CONSENT AGENDA

The Consent Portion of the Agenda is approved by one (1) non-debatable motion. If any Council Member wishes to remove an item from the Consent Portion of the agenda, that item becomes the first order of business on the Regular Agenda.

- [5.](#) Disbursement Listing for August 2025.
- [6.](#) Budget Report for Fiscal Year 2025 through August 2025.
- [7.](#) August 2025 Water Usage Comparison.
- [8.](#) Minutes: August 20, 2025 - Town Council Hearing and Meeting.

REQUEST FOR A CLOSED SESSION: IF NECESSARY

ADJOURNMENT

CERTIFICATE OF POSTING: I, Jenna Vizcardo, as duly appointed Recorder for the Town of Apple Valley, hereby certify that this Agenda was posted at the Apple Valley Town Hall, the Utah Public Meeting Notice website <http://pmn.utah.gov>, and the Town Website www.applevalleyut.gov.

THE PUBLIC IS INVITED TO PARTICIPATE IN ALL COMMUNITY EVENTS AND MEETINGS

In compliance with the Americans with Disabilities Act, individuals needing special accommodations (including auxiliary communicative aids and services) during this meeting should notify the Town at 435-877-1190 at least three business days in advance.



Proposal: Zone Change

Current Zone: OST

Proposed Zone: AG-10

Acres: 80.24

Project location: AV-1354-B

Number of Lots: 1

Report prepared by Eldon Gibb, Planning Consultant with Shums Coda

On the Zone Change application, the applicant identified the proposed zone change for parcel AV-1354-B. I confirmed this parcel has a total acreage of 80.24 as identified in the application; however, on the third page of the application, the applicant highlighted parcel AV-1354-B-1 which I verified has a total acreage of 20. Both of these parcels have the same zoning designation of OST and a general plan designation as agricultural but this should be clarified as to which property the applicant intends to pursue the proposed zone change for.

Regarding parcel AV-1354-B, The applicant is proposing to change the zoning from the OST to a proposed AG-10. As stated above, there is a conflict for which the applicant identified and should be clarified. Regarding parcel AV-1354-B, this parcel is located off of and fronts south Main street. As stated in the application, the purpose for the zone change is to prepare for a lot-split.

The property (AV-1354-B) is currently zoned OST. Surrounding zoning is Agricultural to the north, OST and Agricultural to the east, Agricultural to the south and Open Space Transition to the west. The General Plan for this property is Agricultural. The applicant is asking to change the zone from OST to AG-10 which is in line with the General Plan map.

When looking at Section 2 of the General Plan, it is apparent that this zone change is in line with section 2.3 - Major Land Use Themes - as this proposal would require lots to be 10 acres in size or larger. Furthermore, in section 2.4 - Land Use Goals it is stated as a goal, "Maintain the small-town, rural feel of Apple Valley". It appears this zone change application is in line with the intent of the General as it would create large lot sizes and help preserve the agricultural and historic heritage of Apple Valley.

Access to the property (AV-1354-B) is available as the property fronts Main Street. If approved, the applicant would be required to abide by the A-10 zoning regulations as found in the town code.

TOWN OF APPLE VALLEY
ORDINANCE O-2025-33

AN ORDINANCE CHANGING THE ZONING CLASSIFICATION OF PARCEL AV-1354-B FROM OPEN SPACE
TRANSITION ZONE (OST) TO AGRICULTURAL 10 ACRES ZONE (AG-10)

WHEREAS, the Town of Apple Valley (“Town”) has petitioned to rezone parcel AV-1354-B from Open Space Transition Zone (OST) to Agricultural 10 Acres Zone (AG-10); and

WHEREAS, the Planning Commission held a duly noticed public hearing on September 10, 2025, to consider the request and, in a meeting on the same date, voted to recommend approval of the zone change; and

WHEREAS, the Town Council has reviewed the Planning Commission’s recommendation and finds that the proposed zone change aligns with the Town’s General Plan and serves a rational public interest; and

WHEREAS, on September 17, 2025 the Town Council of Apple Valley, Utah, convened in a duly noticed and held meeting to consider the proposed amendment;

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND TOWN COUNCIL OF THE TOWN OF APPLE VALLEY, UTAH, AS FOLLOWS:

SECTION I: Zoning Amendment
The zoning designation for parcel AV-1354-B is hereby changed from Open Space Transition Zone (OST) to Agricultural 10 Acres Zone (AG-10).

SECTION II: Official Zoning Map Update
The Official Zoning Map shall be amended to reflect this zoning change.

SECTION III: Effective Date:
This ordinance shall take effect immediately upon passage and adoption.

PASSED AND ADOPTED by the Mayor and Town Council of the Town of Apple Valley, Utah, this 17th day of September, 2025.

PRESIDING OFFICER

Michael L. Farrar, Mayor

ATTEST:

Jenna Vizcardo, Town Clerk/Recorder

VOTE RECORD:	AYE	NAY	ABSENT	ABSTAIN
Mayor Michael Farrar	_____	_____	_____	_____
Council Member Kevin Sair	_____	_____	_____	_____
Council Member Annie Spendlove	_____	_____	_____	_____
Council Member Scott Taylor	_____	_____	_____	_____
Council Member Richard Palmer	_____	_____	_____	_____



Town of Apple Valley

1777 N Meadowlark Dr

Apple Valley UT 84737

T: 435.877.1190 | F: 435.877.1192

www.applevalleyut.gov

See Fee Schedule Page 2

Item 1.

Zone Change Application

Applications Must Be Submitted By The First Wednesday Of The Month

Owner: 1703 S Manzanita Dr. LLC Alan Duckstadter		Phone: [REDACTED]	
Address: [REDACTED]		Email: [REDACTED]	
City: [REDACTED]	State: [REDACTED]	Zip: [REDACTED]	
Agent: (if Applicable)		Phone: [REDACTED]	
Address/Location of Property:		Parcel ID: AV-1354-B	
Existing Zone: OST		Proposed Zone: Agricultural 10	
For Planned Development Purposes: Acreage in Parcel 80.24		Acreage in Application 80.24	
Reason for the request prepare for lot split			

Submittal Requirements: The zone change application shall provide the following:

- VA ☐ A. The name and address of owners in addition to above owner.
- ☐ B. An accurate property map showing the existing and proposed zoning classifications
- ☐ C. All abutting properties showing present zoning classifications
- ☐ D. An accurate legal description of the property to be rezoned
- ☐ E. A letter from power, sewer and water providers, addressing the feasibility and their requirements to serve the project.
- ☐ F. Stamped envelopes with the names and address of all property owners within 500' of the boundaries of the property proposed for rezoning. Including owners along the arterial roads that may be impacted
- ☐ G. Warranty deed or preliminary title report and other document (see attached Affidavit) if applicable showing evidence the applicant has control of the property
- ☐ H. Signed and notarized Acknowledgement of Water Supply (see attached).

Applicant Signature Alan	Date 8-7-25
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Official Use Only	Amount Paid: \$ 4,209.60	Receipt No: 57421
Date Received: 8/7/25	Date Application Deemed Complete:	
By: [Signature]	By:	4

Note: To avoid delays in processing your Zone Change request, it is important that all applicable information noted above, along with the fee, is submitted with the application. An incomplete application will not be scheduled for the Planning Commission. Planning Commission meetings are held on the second Wednesday of each month at 6:00 pm. Submission of a completed application does not guarantee your application will be placed on the next PC meeting agenda. It may be placed on the next available PC meeting agenda.

REQUIRED CONSIDERATIONS TO APPROVE A ZONE CHANGE

When approving a zone change, the following factors shall be considered by the Planning Commission and Town Council:

1. Whether the proposed amendment is consistent with the Goals, Objectives and Policies of the Town's General Plan;
2. Whether the proposed amendment is harmonious with the overall character of existing development in the vicinity of the subject property;
3. The extent to which the proposed amendment may adversely affect adjacent property; and
4. The adequacy of facilities and services intended to serve the subject property, including, but not limited to roadways, parks and recreation facilities, fire protection, schools, storm water drainage systems, water supplies, and waste water and refuse collection.

PROCESS

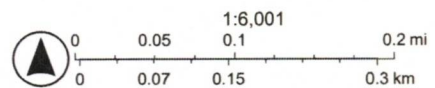
Contact the Planning Department for when the deadline for submission is. After it is deemed complete, staff will review the request, and prepare a report and recommendation for the Planning Commission. This will be reviewed at a public hearing where the applicant should attend, present the project, and respond to questions from the Planning Commission. Since it is a public hearing, members of the public may also have questions or comments. At the public hearing the Planning Commission will review the application and staff's report and forward a recommendation to the Town Council for approval, approval with modifications, or denial of the zone change application.

Upon receipt of the Planning Commission recommendation, typically 1-2 weeks after the Planning Commission action, the Town Council will consider and act on the Commission's recommendation. The action of the Town Council is final. If denied, a similar application generally cannot be heard for a year.



8/11/2025, 1:51:26 PM

- | | |
|--------------------------------|-------------------------------|
| Washington County Parcels | A-X - A Agriculture |
| Town Boundary | OSC - Open Space Conservation |
| Zoning Districts | |
| A-5 - Agricultural > 5 Acres | OST - Open Space Transition |
| A-10 - Agricultural > 10 Acres | RE-5 - Rural Estate 5 |



Account Number 0155302
Parcel Number AV-1354-B
Tax District 45 - Apple Valley Town
Acres 80.24
Situs 0, 0

Name 1703 S MANZANITA DR LLC
2386 E CANAAN WAY
APPLE VALLEY, UT 84737

Item 1.

Legal S: 8 T: 43S R: 11W BEGINNING AT THE SOUTHEAST CORNER OF SECTION 8, TOWNSHIP 43 SOUTH, RANGE 11 WEST, SALT LAKE BASE AND MERIDIAN, RUNNING THENCE N88°43'30"W, 1321.80 FEET ALONG THE SOUTH LINE OF SAID SECTION 8; THENCE N1°13'29"E, 2644.07 FEET TO A POINT ON THE EAST-WEST CENTER SECTION LINE OF SAID SECTION 8; THENCE S88°42'27"E, 1322.39 FEET ALONG THE EAST-WEST CENTER SECTION LINE TO THE EAST QUARTER CORNER OF SAID SECTION 8; THENCE S1°14'15"W, 2643.67 FEET ALONG THE EAST LINE OF SAID SECTION 8 TO THE POINT OF BEGINNING. CONTAINING 80.244 ACRES. (INST NO 20220051988 "PARCEL A DESCRIPTION")

Parent Accounts

Parent Parcels

Child Accounts 0555832
0602295
0697584
0155294

Child Parcels 1354-B-1

1354-C-SE
1354-D-SE
AV-1354-A-1

Sibling Accounts

Sibling Parcels

Warranty Deed Page 1 of 3

Gary Christensen Washington County Recorder
05/09/2025 03:36:25 PM Fee \$40.00 By FIRST
AMERICAN - ST. GEORGE MAIN

Recording Requested by:
First American Title Insurance Company
50 East 100 South, Suite 100
St. George, UT 84770
(435)673-5491

Mail Tax Notices to and
AFTER RECORDING RETURN TO:
1703 S. Manzanita Dr. LLC
2386 E. Canaan Way
Apple Valley, UT 84737

SPACE ABOVE THIS LINE (3 1/4" X 5") FOR RECORDER'S USE

WARRANTY DEED

Escrow No. **363-6348803 (AS)**
A.P.N.: **AV-1354-B**

Bang Properties LLC, a Utah limited liability company, and Roxstar Properties LLC, a Utah limited liability company, Grantor, of St. George, Washington County, State of UT, hereby CONVEY AND WARRANT to

1703 S. Manzanita Dr., LLC, a Utah limited liability company, Grantee, of Apple Valley, Washington County, State of UT, for the sum of Ten Dollars and other good and valuable considerations the following described tract(s) of land in Washington County, State of Utah:

Beginning at the Southeast corner of Section 8, Township 43 South, Range 11 West, Salt Lake Base and Meridian, running thence North 88°43'30" West, 1321.80 feet along the South line of said Section 8; thence North 1°13'29" East, 2644.07 feet to a point on the East-West Center Section line of said Section 8; thence South 88°42'27" East, 1322.39 feet along the East-West Center Section line to the East quarter corner of said Section 8; thence South 1°14'15" West, 2643.67 feet along the East line of said Section 8 to the Point of Beginning.

Subject to easements, restrictions and rights of way appearing of record and general property taxes for the year 2025 and thereafter.

Witness, the hand(s) of said Grantor(s), this 9th May, 2025.

[Signature page follows]

A.P.N.: AV-1354-B

Warranty Deed - continued

File No.: 363-6348803 (AS)

Bang Properties LLC, a Utah limited liability company

Roxstar Properties LLC, a Utah limited liability company

By: [Signature]Name: Kerry Bang
Title: MemberBy: [Signature]Name: Randall D. Paul
Title: ManagerBy: [Signature]Name: Brecken Bang
Title: Member

STATE OF

Utah

County of

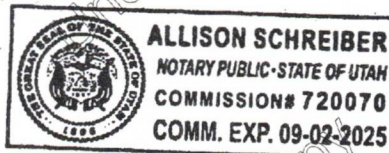
Washington) ss.

On May 9, 2025, before me, the undersigned Notary Public, personally appeared **Kerry Bang and Brecken Bang, Members of Bang Properties LLC, a Utah limited liability company**, personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies) and that his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.

My Commission Expires: 9/2/25

Notary Public



A.P.N.: AV-1354-B

Warranty Deed - continued

File No.: 363-6348803 (AS)

STATE OF

County of

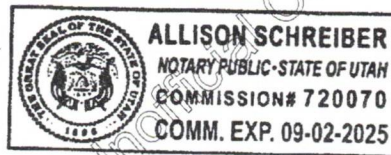
On

Utah
Washington) ss.
May 9, 2025
before me, the undersigned Notary Public,
personally appeared **Randall D. Paul, Manager of Roxstar Properties LLC, a Utah limited liability company**, personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies) and that his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.

My Commission Expires:

Notary Public



SUBDIVISION APPROVAL PROCESS

AFFIDAVIT

PROPERTY OWNER

Item 1.

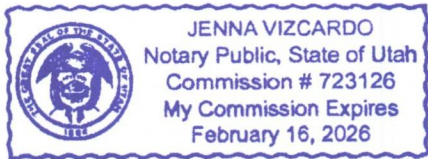
STATE OF UTAH)
)§
COUNTY OF WASHINGTON)

(We) 1703 S Mozanita Dr LLC Alan Dockstader, being duly sworn, depose and say that I (We) am (are) the owner(s) of the property identified in the attached application and that the statements herein contained and the information provided identified in the attached plans and other exhibits are in all respects true and correct to the best of my (our) knowledge. I (We) also acknowledge that I (We) have received written instructions regarding the process for which I (We) am (are) applying and the Apple Valley Town planning staff have indicated they are available to assist me in making this application.

Alan Dockstader
Property Owner

Property Owner

Subscribed and sworn to me this 7 day of August, 2025.



Jenna Vizcardo
Notary Public

Residing in: Washington

My Commission Expires: 2/16/26

AGENT AUTHORIZATION

(We), _____, the owner(s) of the real property described in the attached application, do authorize as my (our) agent(s) _____ to represent me (us) regarding the attached application and to appear on my (our) behalf before any administrative body in the Town of Apple Valley considering this application and to act in all respects as our agent in matters pertaining to the attached application.

Property Owner

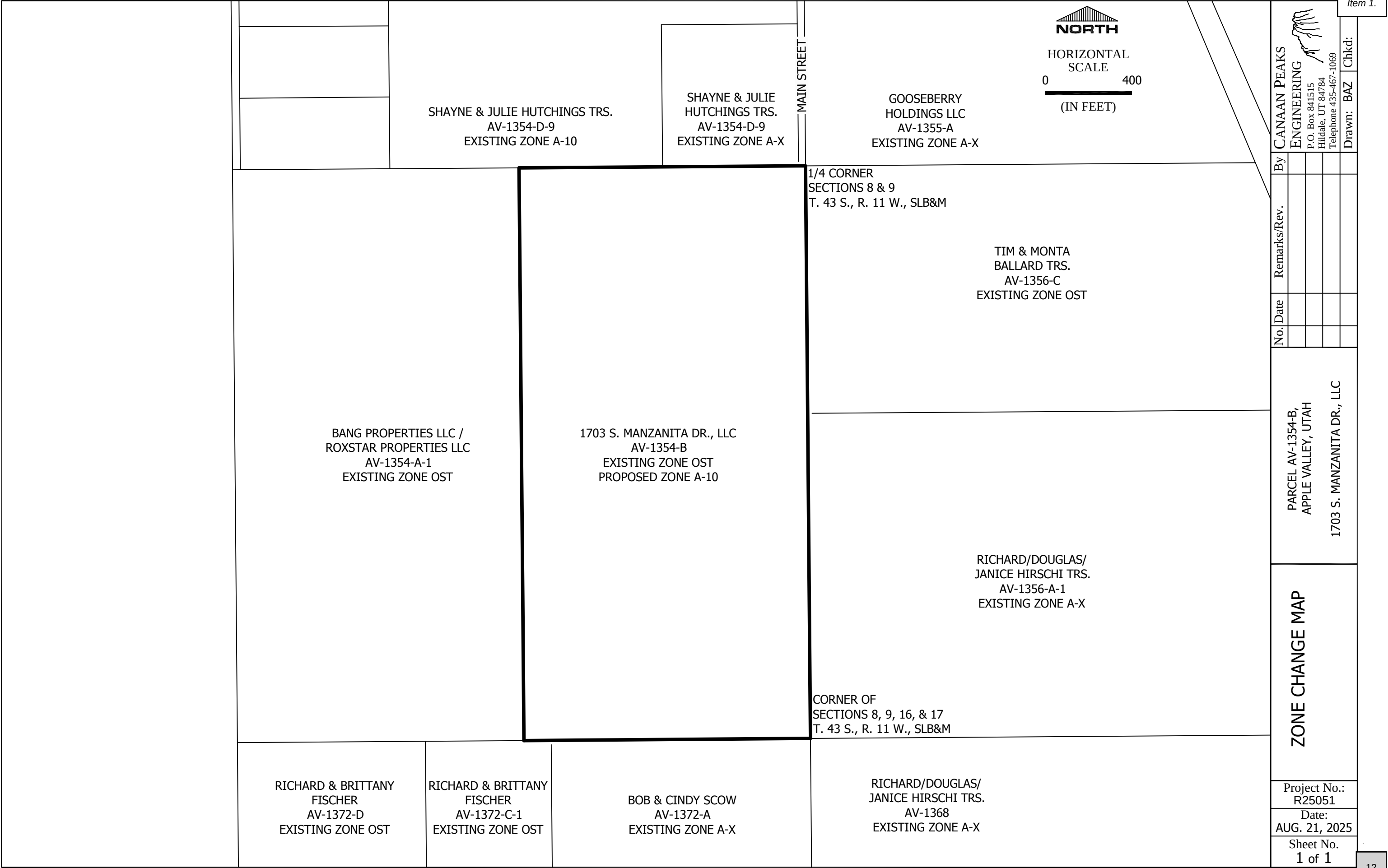
Property Owner

Subscribed and sworn to me this _____ day of _____, 20____.

Notary Public

Residing in: _____

My Commission Expires: _____



Item 1.

By	CANAAN PEAKS ENGINEERING	Drawn:	BAZ	Chkd:	
Remarks/Rev.					
No.	Date				
Project No.: R25051					
Date: AUG. 21, 2025					
Sheet No. 1 of 1					

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APPLE VALLEY RESOLUTION R-2025-21

NOW THEREFORE, be it ordained by the Council of the Apple Valley, in the State of Utah, as follows:

SECTION 1:**AMENDMENT** “SECTION VII Purchasing Procedures” of the Apple Valley Policies & Procedures is hereby *amended* as follows:

A M E N D M E N T

SECTION VII Purchasing Procedures

After compliance with all bid requirements set forth herein, the following shall govern purchasing procedures:

A. Preauthorization procedures

1. Purchases for goods and services not exempted in section VII(D) shall be preauthorized prior to the purchase being made.
 - a. Uniform purchase order forms approved by the Finance Director shall be used to obtain preauthorization for purchases.
 - b. After compliance with all bid requirements, the department or division shall complete a purchase order and submit it to the Finance Director. The Finance Director or his or her designee shall review the purchase order for budget compliance and completeness and return the approved purchase order to the Mayor~~Town Administrator~~ or, ~~in the absence of the Town Administrator, his or her~~ designee for final approval.
 - c. Upon approval by the Mayor~~Town Administrator~~ or ~~his or her~~ designee, the purchase order will be returned to the Finance Director.
 - d. A copy of the approved purchase order will then be returned to the department or division and serves as notification that the purchase has been authorized.
 - e. Based on the parameters of the approved purchase order, the purchase can then be made.

B. Blanket purchase orders

1. A single purchase order may be preauthorized, and budgeted funds noted for the entire amount of contracts and for blanket purchase orders to reduce paperwork and authorization time associated with multiple purchases throughout the year from the same vendor.

C. Payment of invoices

1. The division or department shall submit the invoice to accounts payable for payment. Invoices to be paid shall be accompanied by a copy of the

preauthorized purchase order, or when a blanket purchase order is being used, the face of the invoice shall make reference to the blanket purchase order.

2. Checks will be released to vendors after final approval by the ~~Town Administrator~~ Mayor or Designee. In rare instances checks may need approval by Town Council, when deemed necessary and appropriate by the ~~Town Administrator and/or the~~ Mayor or designee.

D. Exceptions to preauthorization and/or payment of invoice procedures:

1. Purchase Cards (P-Cards)

- a. The Town ~~may~~ utilizes a purchase card program ~~as an alternative to purchase orders to provide a more efficient~~ streamline small dollar purchasing, reduce administrative costs, and provide flexibility while ensuring compliance with state law, Town policy, and internal controls, cost-effective method of purchasing and paying for small-dollar transactions. ~~An essential element of any purchase card program instituted by the Town shall be the ability to establish monthly and single purchase limits. The maximum limits shall be \$5,000 for monthly purchases and \$1,000 for single purchases. Due to the particular work assigned to the fire department, purchasing card maximum limits shall be \$5,000 for monthly purchases, or \$3,000 for single purchases.~~

- b. ~~The Town Administrator shall have the authority to designate employees who are issued purchase cards and establish purchasing limits within the overall parameters of this policy. All employees who are issued a purchasing card shall attend purchase card training prior to being issued the card and shall adhere to the policies and procedures developed for the purchase card program.~~ P-Cards may be issued to employees serving in the capacity designated in this policy, additional people may be approved by the Town Council on the recommendation of the mayor. Public Works- Supervisor, Water Department- Supervisor, Fire Department- Chief, Office Manager, Administrator, Mayor, Treasurer.

(1) The maximum limits shall be \$5,000 for monthly purchases and \$1,500 for single purchases. Due to the particular work assigned to the fire and public works / water departments, purchasing card maximum limits shall be \$5,000 for monthly purchases, and \$3,000 for single purchases. Limits for all other cards may vary by position within the maximum listed parameters at the discretion of the Mayor or designee.

(2) Employees must sign a Cardholder Agreement acknowledging receipt of the card and agreement to abide by this policy.

c. Authorized Uses of P-Card

(1) Small dollar purchases of goods and services required for Town operations.

(2) Online or telephone orders when traditional procurement

methods are impractical.

(3) Travel expenses (lodging, meals, conference fees, fuel) when pre-approved.

(4) Emergency purchases as necessary to protect public health, safety, or Town property.

(5) Fuel and Town vehicle maintenance.

d. Prohibited Uses of P-Card

(1) Personal purchases of any kind.

(2) Cash advances, gift cards, or money orders.

(3) Alcohol, tobacco, or other restricted items.

(4) Splitting purchases to avoid transaction limits.

(5) Any purchase that violates Town procurement policies or Utah law.

e. Cardholder Responsibilities

(1) Obtain and retain itemized receipts for every purchase.

(2) Record GL account codes and project/grant numbers where applicable.

(3) Submit a monthly reconciliation packet (statement, receipts, coding) to the Finance Department within 5 business days of statement receipt.

(4) Immediately report lost or stolen cards to the Finance Director and issuing bank.

(5) Misuse of the P-Card may result in revocation, reimbursement, and disciplinary action, up to termination and/or prosecution.

f. Review and Oversight

(1) The Finance Director will reconcile all P-Card statements monthly

(2) Supervisors will review and approve reconciliations for their department cardholders.

(3) The Finance Director will present a quarterly P-Card usage report to the Town Council for review with the financial consent agenda.

(4) All transactions are subject to review by the State Auditor or independent auditors

g. Termination of Employment

(1) Upon separation of employment, the cardholder must immediately return the P-Card to the Finance Director.

h. Violations of policy may result in:

(1) Revocation of card privileges.

(2) Mandatory reimbursement to the Town.

(3) Disciplinary action up to termination.

(4) Referral to law enforcement in cases of fraud or misuse

2. Refunds of deposits, overpayments and payments for services that ultimately

are not provided to the customer. The ~~Town Administrator~~ Mayor or ~~his or her~~ designee may authorize emergency purchases of materials or services.

3. Electronic transfers of funds from Town accounts to facilitate bond payments, bond closings and other operational needs of the Town when other options are not available, and upon approval of the ~~Town Treasurer and the Town Administrator and/or~~ the Mayor ~~or designee~~.
4. When a cost savings or the loss of a cost savings of the greater of \$100 or five percent of the price would result due to a time deadline upon approval of the department head and the ~~Town Administrator~~ Mayor or Designee.
5. Use of the ~~Town's credit card~~ Mayor's Debit card after obtaining a preauthorized purchase order.
6. Purchases under \$500 for all departments other than the fire department, which shall be \$1,000.

SECTION 2: REPEALER CLAUSE All ordinances or resolutions or parts thereof, which are in conflict herewith, are hereby repealed.

SECTION 3: SEVERABILITY CLAUSE Should any part or provision of this Resolution be declared by the courts to be unconstitutional or invalid, such decision shall not affect the validity of the Resolution as a whole or any part thereof other than the part so declared to be unconstitutional or invalid.

SECTION 4: EFFECTIVE DATE This Resolution shall be in full force and effect from September 17, 2025.

PASSED AND ADOPTED BY THE APPLE VALLEY COUNCIL

_____.

	AYE	NAY	ABSENT	ABSTAIN
Mayor Michael Farrar	_____	_____	_____	_____
Council Member Kevin Sair	_____	_____	_____	_____
Council Member Annie Spendlove	_____	_____	_____	_____
Council Member Scott Taylor	_____	_____	_____	_____
Council Member Richard Palmer	_____	_____	_____	_____

Attest

Presiding Officer

Jenna Vizcardo, Town Clerk, Apple Valley

Michael Farrar, Mayor, Apple Valley



HINTONBURDICK

CPAs & ADVISORS

September 10, 2025

Town Council and Management
Town of Apple Valley
1777 North Meadowlark Drive
Apple Valley, UT 84737

The following represents our understanding of the services we will provide Town of Apple Valley.

You have requested that we audit the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of Town of Apple Valley, as of June 30, 2025, and for the year then ended, and the related notes, which collectively comprise Town of Apple Valley's basic financial statements.

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (GAAS) and in accordance with *Government Auditing Standards*, and/or any state or regulatory audit requirements will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

Accounting principles generally accepted in the United States of America, (U.S. GAAP,) as promulgated by the Governmental Accounting Standards Board (GASB) require that certain required supplementary information (RSI) such as management's discussion and analysis and budgetary comparison be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the GASB, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the RSI in accordance with auditing standards generally accepted in the United States of America, (U.S. GAAS). These limited procedures will consist primarily of inquiries of management regarding their methods of measurement and presentation, and comparing the information for consistency with management's responses to our inquiries. We will not express an opinion or provide any form of assurance on the RSI. The following RSI is required by U.S. GAAP. This RSI will be subjected to certain limited procedures but will not be audited:

1) Management's Discussion and Analysis

Auditor Responsibilities

We will conduct our audit in accordance with GAAS and in accordance with *Government Auditing Standards*, and/or any state or regulatory audit requirements. As part of an audit in accordance with GAAS and in accordance with *Government Auditing Standards*, and/or any state or regulatory audit requirements, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of controls.
- Obtain an understanding of the system of internal control in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing concerning any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Town of Apple Valley's ability to continue as a going concern for a reasonable period of time.

Because of the inherent limitations of an audit, together with the inherent limitations of internal control, an unavoidable risk that some material misstatements may not be detected exists, even though the audit is properly planned and performed in accordance with GAAS and in accordance with *Government Auditing Standards*, and/or any state or regulatory audit requirements.

Although we are currently in the planning stage of our audit, we have identified the following significant risks during our audit to date that require special audit consideration:

1. Management override of controls – a risk that is present in most audit engagements.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any other periods.

Our firm may transmit confidential information that you provided us to third parties in order to facilitate delivering our services to you. We have obtained confidentiality agreements with all our service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have the appropriate procedures in place to prevent the unauthorized release of confidential information to others. We will remain responsible for the work provided by any third-party service providers used under this agreement. By your signature below, you consent to having confidential information transmitted to entities outside the firm. Please feel free to inquire if you would like additional information regarding the transmission of confidential information to entities outside the firm.

Compliance with Laws and Regulations

As part of obtaining reasonable assurance about whether the basic financial statements are free of material misstatement, we will perform tests of Town of Apple Valley's compliance with the provisions of applicable laws, regulations, contracts, and agreements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion.

Management Responsibilities

Our audit will be conducted on the basis that management and, when appropriate, those charged with governance acknowledge and understand that they have responsibility:

- a. For the preparation and fair presentation of the basic financial statements in accordance with accounting principles generally accepted in the United States of America;
- b. For the design, implementation, and maintenance of the system of internal control relevant to the preparation and fair presentation of basic financial statements that are free from material misstatement, whether due to error, fraudulent financial reporting, misappropriation of assets, or violations of laws, governmental regulations, grant agreements, or contractual agreements; and
- c. To provide us with:
 - i. Access to all information of which management is aware that is relevant to the preparation and fair presentation of the basic financial statements such as records, documentation, and other matters;
 - ii. Additional information that we may request from management for the purpose of the audit;
 - iii. Unrestricted access to persons within the entity and others from whom we determine it necessary to obtain audit evidence.
 - iv. A written acknowledgement of all the documents that management expects to issue that will be included in the annual report and the planned timing and method of issuance of that annual report; and
 - v. A final version of the annual report (including all the documents that, together, comprise the annual report) in a timely manner prior to the date of the auditor's report.
- d. For including the auditor's report in any document containing basic financial statements that indicates that such basic financial statements have been audited by us;
- e. For identifying and ensuring that the entity complies with the laws and regulations applicable to its activities;
- f. For adjusting the basic financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the current year period(s) under audit are immaterial, both individually and in the aggregate, to the basic financial statements as a whole; and
- g. For acceptance of nonattest services, including identifying the proper party to oversee nonattest work;
- h. For maintaining adequate records, selecting, and applying accounting principles, and safeguarding assets;
- i. For informing us of any known or suspected fraud affecting the entity involving management, employees with significant role in the system of internal control and others where fraud could have a material effect on the financials; and
- j. For the accuracy and completeness of all information provided.

With regard to the supplementary information referred to above, you acknowledge and understand your responsibility: (a) for the preparation of the supplementary information in accordance with the applicable

criteria; (b) to provide us with the appropriate written representations regarding supplementary information; (c) to include our report on the supplementary information in any document that contains the supplementary information and that indicates that we have reported on such supplementary information; and (d) to present the supplementary information with the audited basic financial statements, or if the supplementary information will not be presented with the audited basic financial statements, to make the audited basic financial statements readily available to the intended users of the supplementary information no later than the date of issuance by you of the supplementary information and our report thereon.

As part of our audit process, we will request from management and, when appropriate, those charged with governance, written confirmation concerning representations made to us in connection with the audit.

Reporting

We will issue a written report upon completion of our audit of Town of Apple Valley's basic financial statements. Our report will be addressed to Town Council and Management of Town of Apple Valley. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinions, add an emphasis-of-matter or other-matter paragraph(s) to our auditor's report, or if necessary, withdraw from the engagement. If our opinions on the basic financial statements are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or to issue a report as a result of this engagement.

In accordance with the requirements of *Government Auditing Standards*, we will also issue a written report describing the scope of our testing of internal control over financial reporting and over compliance with laws, regulations, and provisions of grants and contracts, including the results of that testing. However, providing an opinion on internal control and compliance will not be an objective of the audit and, therefore, no such opinion will be expressed.

Other

We understand that your employees will prepare all confirmations we request and will locate any documents or support for any other transactions we select for testing.

If you intend to publish or otherwise reproduce the basic financial statements and make reference to our firm, you agree to provide us with printers' proofs or masters for our review and approval before printing. You also agree to provide us with a copy of the final reproduced material for our approval before it is distributed.

Regarding the electronic dissemination of audited financial statements, including financial statements published electronically on your Internet website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in these sites or to consider the consistency of other information in the electronic site with the original document.

Professional standards prohibit us from being the sole host and/or the sole storage for your financial and non-financial data. As such, it is your responsibility to maintain your original data and records and we

cannot be responsible to maintain such original information. By signing this engagement letter, you affirm that you have all the data and records required to make your books and records complete.

Provisions of Engagement Administration, Timing and Fees

During the course of the engagement, we may communicate with you or your personnel via fax or e-mail, and you should be aware that communication in those mediums contains a risk of misdirected or intercepted communications.

We expect to begin our audit in approximately October and to issue our report no later than December 31, 2025.

R. McKay Hall, CPA is the engagement partner for the audit services specified in this letter. His responsibilities include supervising HintonBurdick, PLLC's services performed as part of this engagement and signing or authorizing another qualified firm representative to sign the audit report.

Our price estimate for the financial audit, including out-of-pocket costs (such as report reproduction, postage, travel, etc.), will not exceed \$30,750.

The above prices are based on anticipated cooperation from your personnel, timely receipt of information, and the assumption that unexpected circumstances will not be encountered during the audit.

We will schedule the engagement based in part on deadlines, working conditions, and the availability of your key personnel. We will plan the engagement based on the assumption that your personnel will cooperate and provide assistance by performing tasks such as preparing requested schedules, retrieving supporting documents, and preparing confirmations. If your personnel are unavailable to provide assistance in a timely manner, if your staff are unavailable during our scheduled fieldwork dates or requested information has not been prepared, it substantially increases the work we have to do to complete the engagement within the established deadlines. The following circumstances will result in additional fees:

- Delivery of the trial balance less than a week before the established fieldwork dates will result in a minimum increase in fees of 10% over our original fee estimate.
- New versions of the trial balance or more than 15 required audit adjustments will result in a minimum increase in fees of 10% over our original fee estimate.
- If the entity is unable to provide requested information before the final day of scheduled fieldwork or a mutually agreed upon date, inconveniences could create additional fees of 10% over our original fee estimate.

Fees requested or required for additional accounting, consultation and non-audit services beyond the above listed circumstances will be billed in addition to the above fees and will be dependent on the level of service provided. If our fees for these additional services will be significantly more than in prior years, we will discuss the situation with you before we proceed.

Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 30 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report(s). You will be obligated to

compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination.

Interim billings may be submitted as work progresses and expenses are incurred. In the event any statement or invoice rendered by us to you is not paid within thirty (30) days of the date of the invoice, a late charge shall be accrued on the unpaid balance at the rate of 1.5 percent per month until paid. If billings are not paid within thirty (30) days of the invoice date, at our election, we may stop all work until your account is brought current or we may withdraw from this engagement. You acknowledge and agree that we are not required to continue work in the event of your failure to pay on a timely basis for services rendered as required by this engagement letter. You further acknowledge and agree that in the event we stop work or withdraw from this engagement we shall not be liable to you for any damages that occur as a result of our ceasing to render services.

Our liability as auditors shall be limited to the period covered by our audit and shall not extend to periods for which we are not engaged as auditors.

It is our policy to keep work papers related to this engagement for seven (7) years. Upon the expiration of the seven (7) year period, you agree that we shall be free to destroy our work papers. When records are returned to you, it is your responsibility to retain and protect your records for possible future uses, including potential examination by governmental or regulatory agencies.

If we, in our sole discretion, believe a conflict of interest has arisen affecting our ability to deliver services to you in accordance with either the ethical standards of our firm or the ethical standards of our profession, we may be required to suspend or terminate our services without issuing our work product.

Either party may terminate this Agreement at any time, and we reserve the right to withdraw from the engagement without completing services for any reason, including, but not limited to, non-payment of fees, your failure to comply with the terms of this Agreement, or as we determine professional standards require. If our work is suspended or terminated, you agree that we will not be responsible for your failure to meet governmental and other deadlines, or for any liability, including but not limited to, penalties or interest that may be assessed against you resulting from your failure to meet such deadlines.

If this Agreement is terminated before services are completed, you agree to compensate us for the services performed and expenses incurred through the effective date of termination.

In the event of any dispute, claim, question, or disagreement arising from or relating to this Agreement or the breach thereof, the parties hereto shall use their best efforts to settle the dispute, claim, question, or disagreement. To this effect, they shall consult and negotiate with each other in good faith and recognizing their mutual interests, attempt to reach a just and equitable solution satisfactory to both parties. If the dispute cannot be settled through direct discussions, the parties agree to endeavor first to settle the dispute in an amicable manner by mediation administered by the American Arbitration Association under its Commercial Mediation Rules before resorting to other legal remedies. If the parties are unable to resolve the dispute through mediation within sixty (60) days from the date notice is first given, then they may proceed to resolve the matter by arbitration. Such arbitration shall be binding and final.

Any dispute over fees will be submitted for resolution by arbitration in accordance with the rules of the American Arbitration Association. In agreeing to arbitration both parties acknowledge that, in the event of a dispute, each party is giving up the right to have the dispute decided in a court of law before a judge or jury and instead are accepting the use of arbitration for resolution. Costs of any mediation proceeding

shall be shared equally by all parties. The prevailing party in the arbitration shall be entitled to an award of reasonable attorney's fees and costs incurred in connection with the application of the dispute in an amount to be determined by the arbitrator.

During the course of the audit, we may observe opportunities for economy in, or improved controls over, your operations. We will bring such matters to the attention of the appropriate level of management, either orally or in writing.

You agree to inform us of facts that may affect the basic financial statements of which you may become aware during the period from the date of the auditor's report to the date the financial statements are issued.

At the conclusion of our audit engagement, we will communicate to Town Council and Management the following significant findings from the audit:

- Our view about the qualitative aspects of the entity's significant accounting practices;
- Significant difficulties, if any, encountered during the audit;
- Uncorrected misstatements, other than those we believe are trivial, if any;
- Disagreements with management, if any;
- Other findings or issues, if any, arising from the audit that are, in our professional judgment, significant and relevant to those charged with governance regarding their oversight of the financial reporting process;
- Material, corrected misstatements that were brought to the attention of management as a result of our audit procedures;
- Representations we requested from management;
- Management's consultations with other accountants, if any; and
- Significant issues, if any, arising from the audit that were discussed, or the subject of correspondence, with management.

The audit documentation for this engagement is the property of HintonBurdick, PLLC and constitutes confidential information. However, we may be requested to make certain audit documentation available to regulators and federal agencies pursuant to authority given to it by law or regulation, or to peer reviewers. If requested, access to such audit documentation will be provided under the supervision of HintonBurdick, PLLC's personnel. Furthermore, upon request, we may provide copies of selected audit documentation to these agencies and regulators. The regulators and agencies may intend, or decide, to distribute the copies of information contained therein to others, including other governmental agencies.

In accordance with the requirements of *Government Auditing Standards*, a copy of our latest external peer review report of our firm is available on our website for your consideration and files.

Please sign and return the attached copy of this letter to indicate your acknowledgment of, and agreement with, the arrangements for our audit of the basic financial statements including our respective responsibilities.

We appreciate the opportunity to be your financial statement auditors and look forward to working with you and your staff.

Respectfully,

HintonBurdick, PLLC

RESPONSE:

This letter correctly sets forth the understanding of Town of Apple Valley:

Management Signature (required): _____

Name and Title: _____

Governance Signature (optional): _____

Name and Title: _____

Request for Statement of Qualifications (SOQ)

Town of Apple Valley, Utah

Impact Fee Facilities Plans – General Municipal Services (CIB) and Parks & Recreation (ORPA)

1. Introduction

Procurement Compliance Statement

This solicitation is being conducted in accordance with the Utah Procurement Code (§63G-6a). Because the estimated value of services exceeds the small purchase threshold of \$100,000 for design professional services, the Town of Apple Valley is required to use a qualifications-based selection process.

Accordingly:

- **Statements of Qualifications shall NOT include cost or fee information.**
- Selection will be based solely on the published evaluation criteria.
- Following selection, the Town will enter into negotiations with the highest-ranked consultant to establish a fair and reasonable contract. If agreement cannot be reached, the Town may enter into negotiations with the next highest-ranked consultant.

The Town of Apple Valley invites qualified engineering firms to submit Statements of Qualifications (SOQ) for professional services to prepare an Impact Fee Facilities Plan (IFFP):

1. **General Municipal Services IFFP** – funded by the Utah Permanent Community Impact Fund Board (CIB), Grant #26-DWS-0207.
2. **Parks & Recreation Master Plan with IFFP** – funded by the Utah Division of Outdoor Recreation’s Outdoor Recreation Planning Assistance (ORPA) program, Contract APP-004540.

The Town may award both projects to a single consultant or to separate firms. Respondents should clearly indicate whether they are submitting qualifications for one or both scopes.

2. Project Funding

This information is provided for context only. Respondents shall not submit cost/fee information.

A. General Municipal Services IFFP – CIB Funded

- **Funding Source:** Utah Permanent Community Impact Fund Board (CIB) Grant #26-DWS-0207 Department of Workforce Services.
- **Total Project Budget:** \$100,000
 - CIB Grant: \$50,000
 - Local Cash Match: \$50,000

B. Parks & Recreation Master Plan with IFFP – ORPA Funded

- **Funding Source:** Utah Outdoor Recreation Planning Assistance (ORPA) grant, Contract APP-004540.
- **Total Project Budget:** \$150,000
 - IFFP and Master Plan ORPA Grant: \$100,000
 - Site Design ORPA Grant: \$50,000
- **Contract Term:** Effective through **December 31, 2026.**

3. Scope of Work

A. General Municipal Services IFFP (CIB Funded)

1. Facility inventory and service level analysis.
2. Growth projections and demand modeling.
3. Development of a 6–10 year Capital Improvement Plan (CIP).
4. Impact fee calculation methodology, service area boundaries, and defensible cost allocation.
5. Draft and final IFFP compliant with Utah Code.
6. Recommended ordinance language and adoption support.
7. GIS maps, spreadsheets, and supporting documentation.

B. Parks & Recreation Master Plan with IFFP (ORPA Funded)

1. Prepare a comprehensive Parks & Recreation Master Plan paired with a legally defensible IFFP.
2. Inventory and map existing and potential parks, trails, and recreational facilities.
3. Assess community needs, establish service levels, and identify long-term goals for equitable access to recreation.
4. Integrate conservation and open space values into the planning process.
5. Facilitate community engagement, including surveys, workshops, and public meetings.

6. Develop a 6–10 year Parks & Recreation Capital Improvement Plan with costs, priorities, and phasing.
 7. Provide draft and final deliverables, including ordinance recommendations to implement impact fees.
 8. Deliver GIS datasets, spreadsheets, and public-ready planning materials.
-

4. Deliverables

- Municipal IFFP (CIB funded).
 - Parks & Recreation Master Plan with IFFP (ORPA funded).
 - Recommended ordinance language for both projects.
 - GIS and financial modeling support files.
 - Community presentation materials for workshops and adoption hearings.
-

5. Qualifications

Respondents must demonstrate:

- Expertise in impact fee planning for municipalities and recreation systems.
 - Familiarity with Utah Impact Fees Act (Utah Code 11-36a).
 - Experience preparing master plans with IFFPs for Utah communities.
 - Strong skills in GIS mapping, financial modeling, and public engagement.
 - Capacity to complete both projects within the specified grant periods.
 - Design professionals work history and experience.
 - Performance ratings for professionals performing the work
 -
-

6. Procurement & Selection

- Procurement will follow Utah Procurement Code (§63G-6a).
- Firms may apply for one or both scopes.
- The Town reserves the right to award one or both projects to the consultant(s) deemed in the Town's best interest.

Evaluation Criteria:

- Relevant Experience & Qualifications – 40%
- Understanding of Project Scope & Approach – 30%
- Capacity & Availability – 20%

- References & Past Performance – 10%
-

7. Submittal Instructions

SOQs must clearly state whether the firm is responding to:

- (a) General Municipal Services IFFP (CIB Funded),
- (b) Parks & Recreation Master Plan with IFFP (ORPA Funded), or
- (c) Both Projects.

Submittal Deadline: September 1, 2025

Email Submittal : mkinney@applevalleyut.gov

Delivery Address:

Town of Apple Valley
Attn: Michelle Kinney, Finance Director
1777 North Meadowlark Dr. Apple Valley, Utah 84737
Email: mkinney@applevalleyut.gov

Town of Apple Valley

Consultant Selection Toolkit

For use with: CIB Grant #26-DWS-0207 & ORPA Contract APP-004540

This packet combines all evaluation tools in plain language for committee members. All firms who submit responsive SOQs will be interviewed.

Cover Sheet – Firms Interviewed

Use this table to record all firms that submitted SOQs and track interview details. All firms that apply and are deemed responsive will be interviewed. Negotiations will take place with the highest-ranked firm after interviews are complete.

Firm Name	Submitted SOQ (Y/N)	Responsive (Y/N)	Interview Date	Projects (CIB / ORPA / Both)
_____	—	—	_____	_____
_____	—	—	_____	_____
_____	—	—	_____	_____
_____	—	—	_____	_____
_____	—	—	_____	_____

1. SOQ Evaluation Matrix – Written Submittals

Score each SOQ on qualifications only. Do not include costs.

Category	Weight	Criteria	Score
Firm Experience & Qualifications	40	Experience with IFFPs, municipal services, recreation planning.	___
Project Understanding & Approach	30	Clear approach and understanding of Apple Valley's needs.	___
Capacity & Availability	20	Availability of key staff; ability to finish within grant periods.	___
References & Past Performance	10	Strong references and record of success.	___

2. Interview Scoring Sheet (Individual)

All responsive firms will be interviewed. Fill in this form for each firm.

Firm Information (to be completed by hand):

Firm Name: _____

Primary Contact: _____

Phone/Email: _____

Interview Date & Time: _____

Project(s): ☐ CIB ☐ ORPA ☐ Both

Category	Weight	Criteria	CIB Score	ORPA Score
Firm Experience & Qualifications	25	CIB: Municipal IFFPs. ORPA: Parks & recreation plans.	___	___
Project Understanding & Approach	25	CIB: Growth/facilities. ORPA: Rec needs/service levels.	___	___
Project Team & Capacity	20	Staff availability and ability to complete in time.	___	___
Community Engagement	15	Public meetings, surveys, workshops.	___	___
Technical Tools & Deliverables	10	GIS, maps, spreadsheets, ordinances.	___	___
Overall Fit & Responsiveness	5	Suitability for Apple Valley; responsiveness in interview.	___	___

2. Interview Scoring Sheet (Individual)

All responsive firms will be interviewed. Fill in this form for each firm.

Firm Information (to be completed by hand):

Firm Name: _____

Primary Contact: _____

Phone/Email: _____

Interview Date & Time: _____

Project(s): ☐ CIB ☐ ORPA ☐ Both

Category	Weight	Criteria	CIB Score	ORPA Score
Firm Experience & Qualifications	25	CIB: Municipal IFFPs. ORPA: Parks & recreation plans.	___	___
Project Understanding & Approach	25	CIB: Growth/facilities. ORPA: Rec needs/service levels.	___	___
Project Team & Capacity	20	Staff availability and ability to complete in time.	___	___
Community Engagement	15	Public meetings, surveys, workshops.	___	___
Technical Tools & Deliverables	10	GIS, maps, spreadsheets, ordinances.	___	___
Overall Fit & Responsiveness	5	Suitability for Apple Valley; responsiveness in interview.	___	___

3. Interview Summary Score Sheet (Committee)

After all firms are interviewed, use this sheet to record scores and calculate averages.

Firm Information (to be completed by hand):

Firm Name: _____

Primary Contact: _____

Phone/Email: _____

Interview Date & Time: _____

Project(s): ☐ CIB ☐ ORPA ☐ Both

Firm	Committee Member	CIB Score	ORPA Score
Firm ____	Member Michael Farrar	____	____
Firm ____	Member Kevin Sair	____	____
Firm ____	Member Annie Spendlove	____	____
Firm ____	Member Scott Taylor	____	____
Firm ____	Member Richard Palmer	____	____

Rankings

CIB Final Ranking:

1. _____

2. _____

3. _____

ORPA Final Ranking:

1. _____

2. _____

3. _____

4. Evaluation Procedure Guide

Step 1: Distribute SOQs; make sure no costs are included.

Step 2: Each member scores SOQs individually using the matrix.

Step 3: Scores are added up and averaged. All responsive firms are selected for interview.

Step 4: Conduct interviews with each firm using the scoring sheet.

Step 5: Compile interview scores and calculate averages.

Step 6: Committee reviews results and recommends firm(s).

Step 7: Town Council approves final selection.

Step 8: Contract negotiations start with the top-ranked firm.

Step 9: Keep all forms and notes for CIB and ORPA audits.

5. Quick Checklist (One Page)

- ☐ Review SOQs – ensure no costs included.
- ☐ Score SOQs using the evaluation matrix.
- ☐ Return scores for compilation.
- ☐ Interview all responsive firms with scoring sheets.
- ☐ Compile interview scores and averages.
- ☐ Review rankings and recommend selection.
- ☐ Council approval of selection.
- ☐ Negotiate contract with top-ranked firm.
- ☐ Keep all evaluation records for compliance.

PROPOSAL

IMPACT FEE FACILITIES PLAN SERVICES

September 10, 2025

Response to RFSQ

dta



TOWN OF APPLE VALLEY

SUBMITTED BY:

Kuda Wekwete
Managing Director

8117 Preston Road, Suite 300
Dallas, TX 75225
(800) 969-4382
Kuda@FinanceDTA.com

TOWN OF APPLE VALLEY



IMPACT FEE FACILITIES PLAN SERVICES

PROPOSAL SUBMISSION DEADLINE:

SEPTEMBER 10, 2025, AT 3:00 P.M.

Prepared for:

Town of Apple Valley

1777 North Meadowlark Dr.

Apple Valley, UT 84737

Attention: Michelle Kinney, Finance Director

Project Contact:

Kuda Wekwete

Managing Director, DTA

8117 Preston Road, Suite 300

Dallas, TX 75225

Phone: (800) 969-4DTA x204

Ms. Michelle Kinney
Finance Director
Town of Apple Valley
1777 North Meadowlark Dr.
Apple Valley, UT 84737
E-mail: MKinney@AppleValleyUT.gov

September 9, 2025

RE: Request for Statement of Qualifications ("RFSQ") for Impact Fee Facilities Plan Services

Dear Ms. Kinney:

DTA Public Finance, Inc. ("DTA"), is pleased to submit this proposal to Town of Apple Valley (the "Town"). It is our understanding that the Town is seeking a qualified consultant(s) to prepare Impact Fee Facilities Plans ("IFFPs") for General Municipal Services and Parks and Recreation. **DTA's effort shall address both projects.** All work to be completed will satisfy the requirements of the Impact Fees Act, Title 11, Chapter 36 of the Utah Code (the "Impact Fees Act"). The Impact Fees Act-compliant Development Impact Fee ("DIF") Nexus Study ("Fee Study") would recommend the appropriate fee justification methodology and fee levels to support specific types of Town-selected capital facilities needed to serve new growth.

DTA works closely with planning, parks and recreation, and community development departments of our municipal clients nationwide, including, most recently, the City of Fayetteville (AR), Village of Oswego (IL), County of El Paso, (TX), Pickens County (SC), City of Laconia (NH), City of Delray Beach (FL), City of Plantation (FL), City of Riviera Beach (FL), Hillsborough County (FL), and Jefferson County (FL). In fact, in Utah, DTA provides public finance consulting services to seven improvement associations and special districts located from Salt Lake City to Park City, including Benloch Ranch Improvement Association Nos. 1 and 2. In 2023, DTA was hired by Pickens County, South Carolina, to perform a DIF study to evaluate and update the County's existing infrastructure impact fees. The fees reviewed and recommended in this study included County Administration, Fire, Emergency Medical Services ("EMS"), Emergency Management, Roads and Bridges, Solid Waste, Library, Parks, and Sheriff's Department. The County selected DTA to review, strategize, and implement the first DIFs in the County. A particular challenge in this fee study was that the County is in a region of the country in which both the local government and developer communities are understanding for the first time DIF programs. Fee generation is an important benefit to staff, County Council members, and the building community. **In addition, DTA is a member of the Florida Sheriff's Association and is committed to backing the State's Sheriffs and letting them know we're on the side of public safety for law enforcement and fire rescue.**



As described in greater detail in the attached proposal, DTA is a public finance consulting firm with offices in Irvine, San Jose, San Francisco, and Riverside, California, as well as Dallas and Houston, Texas, Raleigh, North Carolina, and Tampa, Florida. Since its establishment in 1985, DTA has completed consulting assignments for more than 3,000 clients in 26 states. During this period, the firm has been involved in the formation of more than 2,000 public finance districts, with total bond authorizations exceeding \$75 billion. Our financing programs have utilized a variety of public financing mechanisms, such as Special Assessment Areas ("SAAs"), Public Improvement Districts ("PIDs"), Assessment Districts ("ADs"), Community Facilities Districts ("CFDs"), Certificates of Participation, Tax Allocation Bonds, Sewer and Water Revenue Bonds, Marks-Roos Bond Pools, Landscaping and Lighting Districts ("LLDs"), Integrated Financing Districts, and various types of fee

programs. **Notably, DTA is licensed and registered with the U.S. Securities and Exchange Commission ("SEC") and Municipal Securities Rulemaking Board ("MSRB") as a Municipal Advisor (No. 867-01160) and follows all the fiduciary requirements associated with this designation.**

Each of DTA's DIF studies includes a cost-benefit analysis and the determination of nexus between the facilities financed and financing mechanism. DTA has prepared approximately 700 fee justification studies to date for a variety of public improvements, including transportation, water, sewer and flood control facilities, fire protection districts, fire and police stations, parks, libraries, schools, and other types of infrastructure. DTA is also currently involved in impact fee engagements in Arizona, Arkansas, California, Florida, Illinois, New Hampshire, New Mexico, North Carolina, and South Carolina.

DTA has assembled a project team for the Town with the breadth of experience required to provide impact fee consulting services in a professional and timely manner. **This project would be primarily handled out of DTA's Dallas office.** I, Kuda Wekwete, a Managing Director at DTA, would be the Principal-in-Charge and have the Town's primary account responsibility. Hector Perez, a Senior Manager at DTA, and Richard Ruiz, a Manager at DTA, will serve jointly as the primary points of contact and be assisted by other support staff. Steve Runk, P.E., Vice President of Engineering Services at DTA, and David Taussig, Chairman/Managing Director, will provide engineering expertise and technical advisory services, respectively. Brief resumes for each of our team members are included in Section 2 of this proposal. All personnel will be available full-time (100%) for the duration of the project.

DTA has spent years managing growth issues for municipal clients nationwide. We understand the funding challenges to the Town with regards to resource allocation, demographic changes, and the influence of development on budgets, staff, and leadership decisions.

If you have questions regarding this proposal, please contact me by phone at (800) 969 4DTA x204 or by e-mail at Kuda@FinanceDTA.com. Thank you for the opportunity to work with the Town on this engagement.

Best Regards,



Kuda Wekwete
Managing Director
Phone: (800) 969-4DTA
Kuda@FinanceDTA.com

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APPENDICES

APPENDIX A SAMPLE DATA REQUEST FORM

1 APPROACH AND METHODOLOGY

DTA is pleased to submit this proposal to Town of Apple Valley (the “Town”). It is our understanding that the Town is seeking a qualified consultant(s) to prepare Impact Fee Facilities Plans (“IFFPs”) for General Municipal Services and Parks and Recreation. **DTA’s effort shall address both projects.** All work to be completed will satisfy the requirements of the Impact Fees Act, Title 11, Chapter 36 of the Utah Code (the “Impact Fees Act”). The Impact Fees Act-compliant Fee Study would recommend the appropriate fee justification methodology and fee levels to support specific types of Town-selected capital facilities needed to serve new growth. In addition to delivering Geographic Information System (“GIS”) and financial modeling support files, DTA will work and train staff to understand and implement the findings of the Fee Study.

A Project Management Services

DTA has the available capacity within its current personnel and workload to complete this Scope of Work within the proposed timeline. Key personnel will be available to the extent proposed, or designated by the Town, for the duration of the project and no person designated as “key” to the project shall be removed or replaced without the prior written concurrence of the Town. In addition, DTA is not behind schedule or past the completion date for any active projects and has a long history of delivering projects on a timely basis and adhering to agreements. In addition, there are no conflicts of interest that may exist with other clients or projects currently underway.

The DTA team provides a virtual kickoff meeting as an introduction and next steps. At the meeting, the Project Manager for the Town is identified. The team also reviews the data request form and file share process to maximize efficiency, reduce billable hours, and enhance the quality of data. Please refer to **Appendix A** for a Sample Data Request Form. The number of follow-up meetings corresponds to communication and teamwork. Site visit and in-person meeting(s) occur soon after to identify leadership, important decisions, and the timing of the project goals. The Town has regular meetings with the Project Manager and staff at DTA to maximize project flow, project understanding, and any related issues that may prompt review.

DTA has assembled an experienced and capable team with expertise in each unique element of study requested by the Town. All personnel will be available full-time (100%) for the duration of the project. As such, a key objective for this project will be to complete all tasks of the project within the agreed-upon budget and schedule. Time and time again, DTA has proven its ability to adhere to contract agreements and understand the importance of good project management. A number of key strategies employed for all of DTA’s clients are listed below.

- Reviewing prior studies and effectively managing data requests and data gathering/consolidation;
- Ensuring key stakeholder input is received prior to writing any reports, so work need not be duplicated;
- Leveraging technology to request and track information from various sources and stakeholders;

- Setting up standing conference calls (i.e., bi-weekly), in addition to scheduled meetings with Town staff in order to stay on track with tasks and deliverables and discuss critical project elements; and
- Preparing internal report drafts for Town staff review and discussion on conference call(s).

DTA utilizes the software application BQE CORE to track project expenditures. This program is always available to DTA's employees and provides detailed project information ranging from the execution of the contract to completion of the project. To manage this contract effectively in terms of team performance, schedule compliance, and budget adherence, Mr. Wekwete, DTA's Principal-in-Charge, will utilize these tools:

- Bi-weekly assignment checklists throughout the life of the contract to ensure each task remains on schedule by utilizing proper staffing assignments.
- Consistent communication with Town staff via e-mail, telephone, and in-person meetings, as needed.
- Weekly budget review to ensure no budget overruns occur. DTA's customized accounting system will enable us to track the expenditures to date each week and ensure budget compliance.
- Regular meetings with Town staff to discuss progress and any issues and receive guidance.

At DTA, all our multidisciplinary team members come from diverse backgrounds, and we put people first. We pride ourselves on developing strong relationships with our clients and working closely with them to understand the big picture and goals they want to achieve as a result of our engagement, as well as how DTA's work may impact other initiatives both now and in the future. We understand that public finance is about ensuring that communities can thrive by assessing what the best solution is for the community as a whole and what will help the community reach and sustain infrastructure growth goals.

DTA brings a practical perspective combined with real-world experience in working with municipalities, which gives us the ability to understand and communicate with all stakeholders throughout the process. Regarding our engagement approach, we will work closely with Town leadership to engage with property owners, business owners, and community leaders to understand any issues or pressure points, as well as what is envisioned for the future.

Finally, DTA will provide independent and objective work products. Our firm regularly reviews legal opinions, regulations, and statutes that impact or modify public finance-related case law. Thus, DTA is committed to providing deliverables that reflect the most current developments in public finance and real property law.

B Project Approach

DTA would provide all-inclusive professional and technical support to the Town in developing a conceptual project scope and reviewing any existing Town DIF studies related to General Plans, Specific Plans, the Comprehensive Plan, and the Capital Improvements Plan, in addition to preparing a comprehensive review of required impact fee levels documented in the formal Nexus Study prepared under the Impact Fees Act. Having been subjected to legal and developer scrutiny, DTA

has developed a streamlined approach and methodology that establishes a rational and substantial nexus between new development and the need for public facilities.

DTA's Final Report shall not address whether any current or proposed DIFs are valid under the U.S. Constitution's Fifth Amendment Takings Clause. On April 12, 2024, in *Sheetz v. County of El Dorado* (2024), the U.S. Supreme Court held that its decisions in *Nollan v. California Coastal Comm'n* (1987) 483 U.S. 825 and *Dolan v. City of Tigard* (1994) 512 U.S. 374 apply to legislatively imposed conditions on land-use permits. That said, the Supreme Court left it to the California appellate court on remand to address the validity of the traffic impact fee at issue in the case and determine how to apply *Nollan/Dolan* in this context. DTA cannot predict how courts will resolve such issues in the future and is providing no services or guarantees of any kind concerning the validity of any impact fees under the U.S. Constitution's Fifth Amendment Takings Clause.

In determining a reasonable nexus for each specific type of public facility, DTA will utilize one or more of the methodologies discussed below depending upon the data and other information available from the Town and its current infrastructure policies. All the fee methodologies employ the concept of an Equivalent Dwelling Unit ("EDU") to allocate benefit among various land use classes. EDUs are a means of quantifying different land uses in terms of their equivalence to a residential dwelling unit, where equivalence is measured in terms of potential infrastructure use or benefit from each type of public facility. For many types of facilities, EDUs are calculated based on the number of residents or employees generated by each land use class. For other facilities, different measures, such as the number of service calls, quantity of trip miles, or amount of storm water run-off, more accurately represent the benefit provided to each land use class. Transportation facilities typically demand EDU calculations predicated on a per unit or per trip basis. The three types of fee methodologies used by DTA to establish EDUs for a public facility within a typical Impact Fees Act-compliant study are based on either an existing Infrastructure Plan, a predetermined capacity amount, or a generic standard.

Plan-Based Fees: The first method of apportioning fees is based on a "Plan," such as a Master Plan of Facilities, that identifies a finite set of improvements. These Facilities Plans generally identify a finite set of facilities needed by the public agency and are developed according to assessments of facilities needs prepared by staff and/or outside consultants and adopted by the public agency's legislative body. With this plan-based approach, specific costs can be projected and assigned to all land uses planned in the future, often with a specific time period in mind that reflects new development projections. In preparing an impact fee analysis, facilities costs can be allocated in proportion to the amount of demand caused by each type of future development. It works well when it is difficult to measure the actual service needed by a land use type or where capacity cannot be directly related to demand. These plan-based fees are typically per unit assessments. This type of plan-based approach is generally preferable to the two other approaches to cost allocation listed below, but it does require the existence of a Facilities Plan, which is not always available.

Capacity-Based Fees: A second method of fee assessment is based on the "capacity" of a service or system, such as a water tank or a sewer plant. This kind of fee is not dependent on a particular Land Use Plan (i.e., amount or intensity), but rather it is based on a rate or cost per unit of capacity that can be applied to any type of development as long as the system has adequate capacity. This type of fee is useful when the costs of the facility or system are unknown at the outset, but it requires that

the amount of capacity used by a particular land use type be measurable or estimable. Capacity-based impact fees are assessed based on the demand rate per unit.

Standard-Based Fees: A third method of assessing fees is based on “standards” where costs are based on units of demand. This method establishes a generic unit cost for capacity, which is then applied to each land use per unit of demand. Parks are an excellent example of this type of fee structure. For example, a municipality may find that it currently provides five acres of parkland per thousand residents, which it may then require for all new residential development. Thus, this standard is not based on cost but rather on a standard of service. This methodology provides several advantages, including not needing to know the cost of a specific facility, identifying how much capacity or service is provided by the current system, or having to commit to a specific size of facility.

In preparing its analysis, DTA will apply one or more of these three methodologies to each facility type to generate applicable fee levels. However, the results of our quantitative analysis will be tempered by real-world factors to be at least considered by the Town prior to the adoption of revised fee levels.

C Proposed Scope of Work

DTA’s facilities assessment is done via an extensive inventory request and in-person interviews of responsible staff. DTA staff are subject matter experts and providers of the services in the study. Work products stemming from the work plan described in this section will include a memorandum (“memo”) summarizing the fee methodology options, Draft and Final Reports, and IFFPs for General Municipal Services and Parks and Recreation.

Task 1 – Development of Project Strategy and Kickoff Meeting

DTA staff will meet with Town staff in a project kickoff meeting to finalize the details of the project, deliverables, timetables, and tasks, discuss the fee methodologies and best practices, identify needed information (i.e., reports, project/needs lists, stakeholder groups, data, etc.), prepare the final schedule, discuss the public process, and resolve other concerns, as appropriate.

Task 2 – Develop Population and Dwelling Unit Projections

DTA will compile and document existing and future population, planning, and development estimates for the Town. The projections resulting from this task will ultimately calculate fee levels. At this stage, DTA will evaluate Town resources, IFFP(s), all factors affecting the existing Fee Study, and pertinent impact fee(s) as outlined by the Town.

- 2A **Population Projections:** DTA will gather existing information on present and future population for the Town from various sources, including staff, the General Plan, existing Master Plans, the Comprehensive Plan, the Capital Improvements Plan, the U.S. Census, the Utah Governor’s Office of Planning and Budget (“GOPB”), any other relevant Town documents, and from other data sources, as needed.
- 2B **Conduct Entitlement Research and Projections:** DTA will coordinate with Town staff to determine existing and future residential and non-residential development within the Town over the planning horizon. To complete this subtask, DTA will review the General Plan/Capital Improvements Plan and related plans to determine expected development land use patterns in the Town, assess Town records to identify existing entitlements for dwelling

units and commercial/industrial development, and project the number of new dwelling units and commercial/industrial development based on existing entitlements and population projections for the next 20 years, or such other target year as selected by Town staff.

- 2C **Review Current Town Fee Structure:** DTA shall review and summarize the Town's current development fee structures, Town policies and procedures, IFFPs, and other regulatory requirements affecting potential fee structures and revenue program requirements.
- 2D **Review Prior Town Fee Justification Studies:** DTA shall review the approach and methodology utilized in prior Town fee justification studies so they can be evaluated in light of the Town's current needs.

Task 3 – Review Facility/Capital Needs and Levels of Service

This task entails the review of the facilities and capital needs required to serve new development in the study area projected in Task 2. DTA will use existing Town materials (and any relevant reports) as base documents and focus our effort on updating this information.

For any fee program to be comprehensive in its scope, it is necessary to complete a thorough identification and review of all the facilities that will be impacted by additional growth, including those already discussed in the General Plan or Capital Improvements Plan. This task will require close coordination with all appropriate Town departments.

- 3A **Survey/Interview Town Staff:** DTA shall survey/interview Town staff to review projected facilities in the Town, along with major equipment needs, the timing at which improvements will be needed, and any physical data that would assist in developing the costs estimated below in Subtask 3C. Based upon the results of the surveys and interviews, DTA will verify and, if appropriate, expand the list of new facilities found in the General Plan or Capital Improvements Plan to be included within the fee program for the Town.
- 3B **Facilities List:** Based on the information collected in Subtask 3A, DTA shall prepare a facilities needs list that details the new facilities and equipment to serve new development in the Town. Prior needs lists, inventories, and IFFP(s) will be reviewed and discussed with the Town to maximize accuracy and strategic capital needs.
- 3C **Review Cost Estimates:** DTA's engineering and technical staff will, as necessary, consult with Town department heads and/or engineering staff or equivalent to ascertain and understand in-house cost data for existing and projected facilities and equipment, review and/or refine existing cost data, examine major sources of revenue to fund the construction of new public facilities, and provide a proportional estimate between projected costs for new facilities and estimated revenue from mitigation fees and other sources.
- 3D **IFFP Development:** DTA shall develop IFFPs for General Government Services and Parks and Recreation. Each IFFP shall establish a service standard, create an inventory of existing facilities, determine the method of financing existing facilities, assess excess capacity, identify additional facilities needed at present, and determine the method of financing needed facilities.

Deliverables: Draft IFFPs for General Government Services and Parks and Recreation and Revised Draft IFFPs Following Receipt of Town Comments

Task 4 – Develop Methodology for Calculating New Fee Amounts

This task entails developing the methodology used to establish the fee amount for each fee component to the extent appropriate. There are two critical issues that must be considered in developing a fee program. The fee program must generate revenues in a timely manner and the methodology must meet the nexus or benefit requirements of the Impact Fees Act. It is critical that any fee established be legally defensible.

DTA's Fee Study methodology must meet the nexus or benefit requirements of the Impact Fees Act, which requires that there be a nexus between the fees imposed, use of the fees, and development projects on which the fees are imposed. Furthermore, there must be a relationship between the amount of the fee and cost of the improvements. Implicit in these requirements is a stipulation that a public agency cannot impose a fee to cure existing deficiencies in public facilities or improve public facilities beyond what is required based on the specific impacts of new development. The benefit methodology established in this task will be documented in the Final Report.

DTA will recommend a Fee Expenditure Plan to ensure that projects can be fully funded and implemented within any required time limits for expenditures of such funds and possible flexibility to allow collected fees to be used to provide the Town with a match for grant applications. Finally, the memo will include recommendations for methodology and next steps. Upon review and discussion by Town staff, a methodology will be selected.

Deliverable: Memo Summarizing the Fee Methodology Options

Task 5 – Determine Fee Levels

This task entails calculating the fee amounts based upon the dwelling unit and commercial/industrial development projections completed in Task 2, facilities needs and costs determined in Task 3, and methodology selected in Task 4.

5A Calculate Recommended Fee Amounts: DTA shall calculate fees for the Town by inputting the data compiled under the preceding tasks and computing each fee to be levied. This work will be done in a spreadsheet format that can be updated annually. **DTA will also evaluate this data in comparison to surrounding and comparable jurisdictions so as to arrive at comparable and acceptable fee levels.**

5B Document Fee Derivation: DTA shall document the methodology utilized for the fee calculation model that can be understood by the Town and public. DTA shall prepare written statements documenting the validity of the methodology for deriving each of the fees for the Town. These statements will be made to meet the requirements of the Impact Fees Act and documented in the Final Report discussed below.

Task 6 – Prepare Draft and Final Reports

This task entails the preparation of the Draft and Final Reports for consideration by the Town Council and Town staff.

6A Based on the work completed in Tasks 1-5, DTA will prepare the Draft Report for review and consideration by Town staff. The Draft Report will be prepared under the standards of the Impact Fees Act and is expected to include an executive summary, population projections, a

facilities and improvements list, areas of benefit (if applicable), fee calculations, recommended fee levels, and the suggested process for keeping fees current. The report shall include the required written certifications pursuant to the Impact Fees Act, including statements attesting to the following:

- Each IFFP includes only the costs of public facilities that are allowed under the Impact Fees Act, actually incurred, and projected to be incurred or encumbered within 6 years after the day on which each impact fee is paid; and
- The enclosed impact fee analysis includes only the costs of public facilities that are allowed under the Impact Fees Act and does not include the costs of operation and maintenance of public facilities.

6B Prepare Final Report: Based on the incorporation of Town staff comments on the Draft Report, DTA will prepare the Final Report for presentation to the Town Council and Town staff.

Deliverables: Draft and Final Reports

Task 7 – Outline Tasks Required for the Implementation and Administration of the Fee Program

DTA will prepare a list of tasks required of the Town once they have adopted their new fee program. These tasks include the determination of actual fee levels if the Town decides not to impose the maximum fee levels allowed under the Fee Study, the implementation of the fee credit program, and other issues the Town may face when carrying out the fee program. In addition, DTA shall prepare a Draft Ordinance to adopt the fee program, subject to review and approval by the Town's legal counsel.

Deliverable: Draft Ordinance

Task 8 – Attend Up to Four (4) Additional In-Person Meetings, Plus Regular Virtual Meetings for Bi-Weekly Updates

This task entails attendance at a total of five (5) in-person meetings/workshops with Town staff, focus groups, stakeholders, and the Town Council to present information regarding the status of the impact fee program update, draft study, and Final Report to obtain input. DTA will also be prepared to lead meetings and workshops with selected groups to gain better project understanding, gauge community sentiment, and determine the key objectives. During these meetings, DTA will consider community and stakeholder input. For this purpose, DTA will develop handouts for these meetings that summarize the findings and analysis from the Public Review Draft. DTA staff shall also schedule standing conference calls (i.e., bi-weekly) with Town staff to stay on track with tasks and deliverables, to the extent allowable under the proposed maximum budget.

D Information to be Provided by the Town

DTA requests that the following information be provided by the Town at no charge and in a timely manner such that the project does not extend beyond 6 months from the date of authorization to proceed:

- Identification of offsetting revenue sources to fully understand financing options;
- The Town's General Plan, any Specific/Master Plans, Development Agreements, and data regarding existing entitlements;
- To the extent available, detailed description of the proposed public facilities, including the facility name and number of square feet, acres, etc. (as applicable for each type of facility);
- Inventory of completed facilities within the Town, including type, size, and location of facility;
- Cost estimates for proposed facilities (DTA anticipates that the Town's cost data and estimates will be reviewed by DTA staff and discussed with Town staff);
- Existing Town Fee Ordinances and/or Resolutions, as applicable, and administrative decisions related to permitting, building, and the development community; and
- Identification of any committed revenue sources pledged to fund proposed facilities.

E Tentative Project Schedule

DTA's tentative schedule of tasks for a DIF program/Fee Study is outlined below. Given the Town's desired project timeline, this timeline of events can and will be completed within the proposed time frame according to the Town's specifications. **The firm shall provide ongoing communication, education, and outreach throughout the duration of the project. DTA is able to begin work with minimal notice.**

Table 1: Proposed Schedule

Task	Description	Weeks 1 to 5	Weeks 6 to 9	Weeks 10 to 13	Weeks 14 to 18	Weeks 19 to 22	Weeks 23 to 25	Week 26
1	Development of Project Strategy and Kickoff Meeting							
2	Develop Population and Demographic Projections							
3	Review Facility/Capital Needs and Levels of Service							
4	Develop Methodology for Calculating New Fee Amounts							
5	Determine Fee Levels and Generate Cash Flow Analysis							
6	Prepare Draft and Final Reports							
7	Outline Tasks Required for the Implementation and Administration of the Fee Program, Including the Preparation of a Draft Ordinance							
8	Attend Four (4) Additional In-Person Meetings and Virtual Meetings, Plus Regular Virtual Meetings for Bi-Weekly Updates							
Ongoing	Communication, Education, and Outreach of Project							

2 FIRM AND STAFF QUALIFICATIONS

A Firm Qualifications

A.1 Firm Overview

DTA is a national public finance and urban economics consulting firm specializing in infrastructure and public services finance. Our firm, which provides public finance consulting services to both public and private sector clients, has offices in Irvine, San Francisco, San Jose, and Riverside, California, as well as Dallas and Houston, Texas, Raleigh, North Carolina, and Tampa, Florida. Additional information on DTA is available on our website (www.FinanceDTA.com).

DTA's client contact and interaction continue beyond the basic deliverables. DTA is a customer and community-centric firm committed to excellence, quality products, and an open and interactive communication environment. We employ these practices in the workplace, in cities, counties, and towns, and with the many clients that we have served for 40 years. **DTA realizes that every client, like every person, is a distinct entity best understood and served in a direct and collaborative manner.**

DTA serves clients in small towns, medium-sized cities, and larger municipalities. Our service philosophy is three-pronged: we strive to know our customers, understand the communities we're privileged to serve, and always provide the best care, advice, and products. At DTA, we also understand that every project is different, and every outcome is special to our team. Our values of accountability, integrity, and excellence support all work performed. **We create strategies to guide and implement impactful public finance solutions.**

DTA is experienced in mapping, modeling, and public communication through small to mid-size municipal clients. More importantly, DTA is able to perform across operational departments, matrix strategies, and reporting environments in order to support the organization. This is done with a thorough understanding of the important and necessary schedules and deadlines.

Since its formation in 1985, DTA has assisted over 3,000 public and private sector clients in meeting their infrastructure and public services goals. DTA's consulting services include the following:

- **Public infrastructure and public services financing strategies;**
- Public-private partnerships;
- Assessment engineering and special tax consulting;
- Annual administration of ADs, CFDs, SAAs, and PIDs;
- Fiscal and economic impact analyses;
- **DIF studies and user fee studies;**
- Water and wastewater rate studies; and
- Tax Increment Financing ("TIF") in Florida, New Mexico, Nevada, North Carolina, South Carolina, Texas, Utah, and other states.

DTA has also **planned and implemented Public Facilities Financing Plans ("PFFPs")** that have ranged from the quantitative analysis of a single financing mechanism for an individual facility to the preparation of a comprehensive financing plan covering multiple facilities and public services through a series of financing mechanisms. Our financial analyses provide public officials, landowners, and other interested parties with the level of information needed to make fully

informed decisions regarding land use, infrastructure, and public services financing issues. DTA staff has extensive experience working with various stakeholder groups, including public agency legislative bodies, public agency municipal staff, residents, local chapters of the Building Industry Association ("BIA"), local Chambers of Commerce, and other interested parties.

DTA has provided public finance consulting services to virtually every major city and county in the State of California and completed consulting assignments for more than 3,000 clients in 26 states, including Florida, North Carolina, South Carolina, and the Southeast. DTA has also provided public finance consulting services for over 325 fire protection districts, school districts, and water districts.

We understand cost of capital, operationalize the best options, and present you with the staff that works "on the ground" in your state to complete any project of any size and any complexity. **Notably, in Utah, DTA recently provided financial advisory and assessment engineering services to the newly-created Benloch Ranch Homeowners Association during the formation of an improvement association and issuance of the first series of debt, totaling \$33.7 million.** Benloch Ranch is a master-planned community, is in unincorporated Wasatch County and near several significant outdoor recreational venues, including Jordanelle State Park, Park City Mountain Resort, Deer Valley Resort, and Utah Olympic Park (which hosted a variety of events during the 2002 Winter Olympics). The development is planned to consist of approximately 2,300 acres of land and planned to include over 2,100 units at full build-out. The initial special charge will be assessed on 540 Phase 1 residential units.

Perhaps DTA's most outstanding qualification is the dedication and loyalty of our senior employees, many of whom have worked at DTA for 15 years or more and are available should any unique situations arise. **In 40 years of work establishing over 2,000 financing districts and bond programs, DTA has never been sued.** Our quality control is one of the key components in ensuring our firm's success. DTA continues to seek innovative solutions and refine our work product to better serve and protect our clients.

A.2 DIF-Specific Experience

DTA has been performing public facilities fee consulting services for over 38 years, since 1987. We have extensive experience preparing DIF studies that have withstood legal scrutiny to the extent that none of our prior studies have been subject to any type of litigation. DTA has prepared approximately 700 fee justification studies to date for a variety of public improvements, including transportation, water, sewer and flood control facilities, fire protection districts, fire and police stations, parks, libraries, school facilities, and other types of infrastructure.

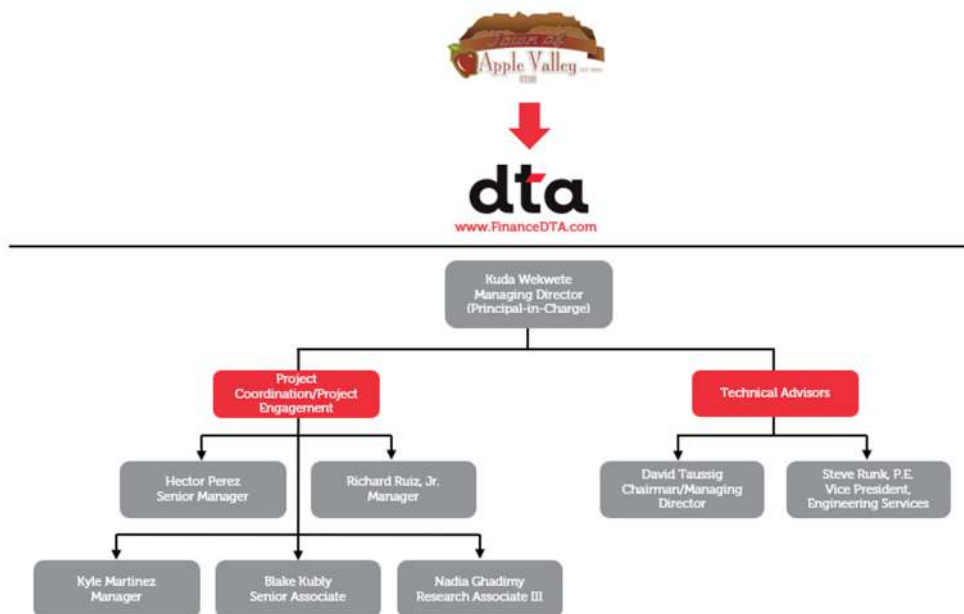
A partial list of the municipal clients whom we have completed impact fee studies for in California in recent years is provided below. **DTA is also currently involved in impact fee engagements in Arizona, Arkansas, Illinois, New Hampshire, New Mexico, North Carolina, South Carolina, and Florida, including the City of Delray Beach, City of Riviera Beach, City of Plantation, Hillsborough County, and Jefferson County.**

- City of Anaheim;
- City of Blythe;
- City of Brawley;
- City of Calexico;
- City of Campbell;
- City of Cathedral City;
- City of Chino;
- City of Chino Hills;
- City of Desert Hot Springs;
- City of Escalon;
- City of Firebaugh;
- City of Fontana;
- City of Fowler;
- City of Glendale;
- City of Hesperia;
- City of Ione;
- City of Kingsburg;
- City of Lakeview;
- City of Live Oak;
- City of Los Banos;
- City of Napa;
- City of Palo Alto;
- City of Pasadena;
- City of Paso Robles;
- City of Perris;
- City of Red Bluff;
- City of Redlands;
- City of Reedley;
- City of San Francisco;
- City of San Luis Obispo;
- City of Santa Ana;
- City of Soledad;
- City of South San Francisco;
- City of Tustin;
- City of Victorville;
- County of Colusa;
- County of Fresno;
- County of Kings;
- County of Riverside;
- County of San Bernardino;
- County of San Francisco;
- County of San Luis Obispo;
- County of Santa Barbara;
- County of Santa Clara Fire Department;
- County of Shasta;
- County of South Santa Clara Fire District;
- County of Yuba;
- Town of Loomis;
- Town of Mammoth Lakes;
- Beaumont Cherry Valley Recreation and Parks District;
- Denair Community Services District;
- El Dorado Hills Community Services District;
- El Dorado County Fire District;
- El Dorado Hills Fire Department;
- Jurupa Area Recreation and Park District;
- San Geronio Memorial Hospital;
- San Geronio Pass Water Agency; and
- South Yuba Transportation Improvement Authority.

B Key Personnel Qualifications

DTA has assigned personnel to this project who bring experience and technical expertise to each unique element of study. Our team organization is illustrated below. Project roles of our key team members are described below and followed by professional resumes. All personnel will be available full-time (100%) for the duration of the project. **DTA does not anticipate employing subconsultants for any portion of this engagement.**

Figure 1: Team Organization Chart



DTA has assembled a project team for the Town with the breadth of experience required to provide impact fee consulting services in a professional and timely manner. **This project would be primarily handled out of DTA's Dallas office.** Mr. Wekwete will serve as the Principal-in-Charge of DTA's project team and handle primary account responsibilities for this engagement. He will attend meetings as necessary and supervise all project staff.

Mr. Perez and Mr. Ruiz will be the Town's primary points of contact throughout this engagement. They will manage the work of DTA's project team, including leading data collection efforts, directing the development of our technical model, providing senior-level analysis, reviewing progress and work products with Town staff and community groups, presenting study findings at project meetings, and finalizing study documentation. Mr. Perez and Mr. Ruiz will be assisted in these tasks by other support staff.

Mr. Taussig will provide technical advisory services related to elements of the Fee Study, as needed, and oversee all quality assurance and quality control measures. Mr. Runk will provide engineering expertise, assist in the selection of facilities to be included on the facilities needs list, prepare and/or review facilities cost estimates, and contribute to the apportionment analysis of specific facilities to be included in the fee program.

Key personnel will be available to the extent proposed, or designated by the Town, for the duration of the project and no person designated as "key" to the project shall be removed or replaced without the prior written concurrence of the Town. In addition, DTA is not behind schedule or past the completion date for any active projects and has a long history of delivering projects on a timely basis and adhering to agreements.

DTA has an enviable reputation for producing high-quality work in a quick and efficient manner to correspond with even the most aggressive project schedule. DTA's clients also receive high levels of personal attention from senior staff, with a Managing Director, Senior Vice President, or Vice President always available to meet with public agency staff and other groups.

B.1 DTA Team Resumes

David Taussig

Chairman/Managing Director | David@FinanceDTA.com

Project Role – Technical Advisor



Mr. Taussig has over 45 years of experience in the fields of real estate finance and urban economics. His areas of expertise include municipal finance programs for infrastructure and public facilities development, fiscal and redevelopment impact analyses, and land development project feasibility studies **across many states and cities, including the States of Arizona, California, Florida, South Carolina, Tennessee, and Utah.**

Mr. Taussig has an extensive background in computerized financial analyses. Since founding DTA in 1985, Mr. Taussig has developed several state-of-the-art analytical methods and modeling approaches, in addition to directing the formation of over 1,000 public financing districts and subsequent sale of tax-exempt municipal bonds. These districts have funded public infrastructure and services for many types of residential and non-residential development and included several hundred master-planned communities built throughout California and in several other western states. Mr. Taussig's work has involved both the preparation and implementation of financing plans and his public sector clients have included virtually every major urban county and city within California and hundreds of special districts. He has provided similar consulting services to many of the largest land development firms in the State of California. The financing programs implemented by Mr. Taussig have ranged from land-secured CFDs to redevelopment tax increment programs and lease revenue-based Certificates of Participation. He is also responsible for DTA's successful efforts related to funding opportunities under various tax credit programs.

Mr. Taussig has also overseen the preparation of numerous feasibility and impact studies involving computerized analyses of project cash flows and/or impacts on public agencies and landowners. He has assumed project management responsibilities for several dozen Assembly Bill ("AB") 1600 DIF justification studies, including recent studies prepared on behalf of the Cities of Blythe, Coachella, Colton, Desert Hot Springs, Fontana, Live Oak, Paso Robles, Perris, Red Bluff, San Luis Obispo, Torrance, and Tustin and the Counties of Colusa, Riverside, and Santa Barbara. He has also handled the preparation of over 100 fiscal impact studies utilized by public agencies to determine the impact of new development or annexations on a municipality.

Mr. Taussig was previously employed for 6 years by Mission Viejo Company ("MVC") where, as the Manager of Housing and Community Development, he was involved in the planning and financing of two planned communities encompassing over 50,000 homes. Mr. Taussig handled a substantial portion of MVC's mortgage and infrastructure financing during that period. He also worked for 5 years in the public sector as the Administrator of a federal housing and community development program and as a Land Use Planner. Mr. Taussig's educational background includes a master's degree in city planning from the University of California at Berkeley and B.A. in economics from Cornell University. He received full certification from the American Institute of Certified Planners in 1982.

Mr. Taussig and the firm are a registered Municipal Advisor with the SEC/MSRB. He holds a Series 54 license as a Principal Municipal Advisor and Series 50 license as a Municipal Advisor under regulations promulgated by the SEC and MSRB. Even after 45 years of experience in the industry, to this day, he continues to seek innovative answers to the industry's biggest questions and contributes to the development of public finance and development-related legislation. In addition, he is an active member of the Urban Land Institute's ("ULI's") National Council for Public-Private Partnerships ("NCPPP") and advocates and facilitates the formation of public-private partnerships at federal, state, and local levels.

Kuda Wekwete

Managing Director | Kuda@FinanceDTA.com
Project Role – Principal-in-Charge

Since joining DTA in 2005, Mr. Wekwete has been involved in all aspects of the formation and implementation of special districts to fund infrastructure and services, as well as the sale of over \$300 million in CFD bonds, **across many states and cities, including the States of Florida, South Carolina, Texas, and Utah.** His work has involved the preparation of tax spreads and overlapping debt analyses for the formation and/or sale of bonds for over 175 special districts established throughout California. In this role, Mr. Wekwete has prepared Rates and Methods of Apportionment ("RMAs"), CFD and Engineer's Reports, and documents required for the formation of CFDs, sale of property, and annual levying of special taxes. He has also been responsible for preparing PFFPs involving CFDs and other public finance mechanisms.



In addition, Mr. Wekwete has been actively involved in the preparation of dozens of fee studies, especially in the area of transportation infrastructure costing, and apportionment of these costs over various land use types based on benefit criteria. His engineering background has enabled him to assist DTA's Vice President of Engineering Services in applying a variety of apportionment methodologies to the development of fee studies and establishment of Benefit ADs for public sector clients. **Mr. Wekwete's recent work on DIF studies has included engagements for the Cities of Colton, Desert Hot Springs, Fontana, Paso Robles, Perris, and Torrance and the Counties of Riverside, San Bernardino, San Luis Obispo, and Santa Barbara, among others.**

Mr. Wekwete also has experience in the preparation of Fiscal Impact Reports ("FIRs"), tax increment analyses, and PFFPs and has performed due diligence services and developed disclosure documentation for land purchasers, public agencies, and lenders.

Mr. Wekwete received his B.S. and M.S. in operations research and industrial engineering from Cornell University and Columbia University, respectively. He also holds a Series 50 license as a registered Municipal Advisor with the SEC/MSRB under rules promulgated following the Dodd-Frank Act in 2010.

Steve Runk, P.E.

Vice President, Engineering Services | Steve@FinanceDTA.com

Project Role – Engineer (State License Number C23473 – California Registered Civil Engineer)



Mr. Runk has over 45 years of experience in the design and construction management of major civil engineering projects, including roadways, bridges, sewer and water improvements, and flood control facilities, grading for public works projects, and construction of commercial and industrial buildings. Mr. Runk's specific responsibilities have included design, quality control, specifications, estimates, construction bid packages, construction coordination and management, cost analyses and cost control, scheduling, manpower forecasting, staffing, and marketing. He has also assisted public agencies and developers in the procurement of funding from the California Department of Transportation ("Caltrans") and other federal and state agencies. Mr. Runk has provided engineering services to municipalities **across many states and cities, including the States of Arizona, Arkansas, Florida, New Mexico, South Carolina, and Utah.**

Mr. Runk has a proven track record of meeting schedules and adhering to budgets. Since joining DTA in 2000, he has worked with local agencies to resolve community issues and negotiate scope changes with contractors to ensure the timely and satisfactory completion of construction projects. He has also acted as the Project Manager for the establishment of ADs and preparation of numerous AB 1600 DIF justification studies. Mr. Runk specializes in preparing assessment apportionment formulas and fee studies for roads, storm drains, and water and wastewater facilities. **He has been involved in preparing needs lists and apportioning facilities costs for many of DTA's AB 1600 studies, including those in the Cities of Anaheim, Brawley, Coachella, Chino Hills, Hesperia, Paso Robles, San Luis Obispo, Tustin, and Victorville, as well as the County of San Bernardino and a number of water districts, including the San Gorgonio Pass Water Agency. He was also closely involved in DTA's previous work as the AB 1600 consultant for the County of Riverside.**

Prior to joining DTA, Mr. Runk, as the Senior Construction Manager for Holmes & Narver, Inc., successfully completed the construction of the SR-41 Freeway in Fresno County, which was the County's first Measure "C" sales tax-funded freeway. Prior to this project, Mr. Runk successfully completed the construction of the SR-71 Freeway in Chino/Chino Hills, California. This \$98 million project was the first Measure "M" sales tax-funded project for the San Bernardino Associated Governments ("SANBAG"). Mr. Runk's responsibilities on both projects included contract management, quality control, public relations, cash flow analyses, project closeout, and compliance with federal and State funding requirements.

Previously, Mr. Runk held positions with various public and private engineering entities in which he delivered projects requiring a wide variety of engineering expertise. He holds a B.S. in engineering from the University of California at Los Angeles and an M.S. in civil engineering from California State University at Long Beach. Mr. Runk is a registered Civil Engineer in the State of California.

Hector Perez

Senior Manager | Hector@FinanceDTA.com

Project Role – Project Coordination

Hector Perez has significant senior management experience in municipal government, health care, resource development, and the private and public sectors. For instance, he has experience with assessing and resolving community development issues, such as capital projects, water/wastewater capacity, sports complexes, traffic impacts, and neighborhood expansions. Mr. Perez has directed strategic planning and financial management responsibilities, budgeting strategy for facilities, technology, and capital expenditures for medium to larger organizations, including public agencies with operating budgets of \$400 million and 3,000 employees. He has supervised construction projects that have included architects, construction companies, space planners, scheduling consultants, and engineers while providing day-to-day budget direction and management.



Mr. Perez also has extensive experience working with municipal government staff members and departments (including countywide public safety operations), volunteers, community activists, regulatory agencies, elected officials, and law enforcement. He has worked with numerous law enforcement offices to achieve staffing levels, inventory modernization, and neighborhood coverage throughout a comprehensive budget. In addition, Mr. Perez worked for a large county in Florida supporting the administration and commissioners with growth management issues, such as roadway expansion, building permits, and related DIFs. **He is responsible for projects in Florida, North Carolina, Texas, South Carolina, and the Southeast consisting of impact fees, PIDs, Special Assessment Districts, and their administration for developers and cities/counties.**

Mr. Perez has a bachelor's degree from Florida State University and a graduate certificate in non-profit management and innovation from the Sykes Graduate Business School at the University of Tampa. In addition, he completed the Certified Financial Planning Course Program at North Carolina State University. Mr. Perez is a member of American Water Works Association ("AWWA") and has the experience and work history of understanding and applying the best practices of AWWA and Water Environment Federation ("WEF") in rate studies.

Richard Ruiz, Jr.

Manager | Richard@FinanceDTA.com

Project Role – Project Engagement



Mr. Ruiz has a background in econometrics and industrial organization. Since joining DTA, he has been involved in the formation and administration of numerous CFDs, ADs, and LLDs throughout California and several other states, including Florida, North Carolina, Texas, and Utah. His responsibilities related to these projects have included the development of tax spread proforma analyses and preparation of overlapping debt analyses. In addition, while at DTA, he has participated in a variety of projects, including fiscal and economic impact studies for cities and counties throughout California, school district rezoning projects, city/county annexation projects, user fee calculations, and living wage analyses.

Mr. Ruiz also has extensive experience working on the preparation of DIF justification studies for cities and counties in California and numerous other states, **including Arizona, Arkansas, Florida, South Carolina, and Utah.** His responsibilities during the impact fee justification and apportionment analysis process for each respective project include the preparation of capital improvement and public facilities needs lists, data collection, the development and modification of the DIF Report model, the production of a written report, and interactions with city, county, and district staff and key stakeholders. Mr. Ruiz' recent work on DIF studies in California has included engagements for the Cities of Chino Hills, Colton, Coronado, Cypress, Daly City, Desert Hot Springs, Fontana, Fowler, Inglewood, Ione, Manteca, Mammoth Lakes, Norco, Palo Alto, Perris, San Jose, Soledad, Torrance, Upland, Victorville, and Yucaipa and the Counties of San Luis Obispo and Santa Barbara, among others, in addition to the El Dorado Hills Fire Department. **East coast projects include Pickens County, South Carolina, City of Fayetteville, Arkansas, City and County of El Paso, Texas, City of Laconia, New Hampshire, Village of Oswego, Illinois, and City of Riviera Beach, City of Delray Beach, City of Plantation, Hillsborough County, and Jefferson County, Florida.**

Prior to joining DTA, Mr. Ruiz spent 14 years with an energy economics consulting firm that focused on economic and market research studies, mergers and acquisitions analyses, market entry research strategies, and economic due diligence projects for companies seeking equity funding. He has a degree in economics from California State University at Long Beach with a concentration in public finance. Mr. Ruiz is a member of AWWA and has the experience and work history of understanding and applying the best practices of AWWA and WEF in rate studies. He is also a Professional Member with the Institute of Transportation Engineers ("ITE").

Kyle Martinez

Manager | Kyle@FinanceDTA.com

Project Role – Project Engagement

Since joining DTA in 2016, Kyle Martinez has been actively involved in the formation, implementation, and administration of CFDs, ADs, improvement associations, and other special assessments and districts throughout the **States of Arizona, California, Florida, Utah, and the Southeast.** Her work has involved the preparation of RMAs, overlapping debt analyses, Engineer's Reports, and apportionment studies. She has experience in the calculation of special tax levies and assessment installments, in addition to conducting relevant parcel research, ownership and prepayment analyses, and continuing disclosure obligations. Ms. Martinez oversees special assessment administration and the levy of approximately \$80 million annually in the County of Santa Clara, California, alone. Ms. Martinez has worked on nearly one dozen fiscal and economic impact analyses for cities and counties. Her responsibilities during these analyses for each respective project include evaluating the revenues generated by a development project as associated with the costs and determining the direct, indirect, and induced employment and economic benefits generated by new development.



Ms. Martinez has extensive experience working on the preparation of DIF and capacity fee studies for cities, counties, and special districts, as well as the analysis and review of rate calculations for water/wastewater capacity fee studies throughout North Carolina. Her

responsibilities include the analysis of capital improvement and public facilities needs lists, inventories, and asset lists, data collection, the development of DIF Report models, the preparation of written reports and corresponding staff reports, and collaboration with city and county staff and key stakeholders. Ms. Martinez' recent work on DIF studies in California has included engagements for the Cities of Campbell, Palo Alto, San Jose, and Soledad and the Counties of Kings and Shasta, among others. The City of Campbell's fee study focused on parkland acquisition, while the City of Palo Alto's fee study featured Parks, Library, and Community Center Fee updates with a parkland acquisition component. Ms. Martinez is also currently supporting DTA teams on impact fee updates for the Town of Queen Creek, Arizona, Hillsborough County, Florida, and the City of Riviera Beach, Florida.

Ms. Martinez received her Bachelor of Arts degree in communications with an emphasis in journalism from California State University, Fullerton.

C References

DTA has completed consulting assignments for more than 3,000 clients in 26 states, including Arizona, California, Colorado, Florida, New Mexico, North Carolina, South Carolina, Tennessee, and Utah. Listed below are four (4) references for DTA's recent work involving public finance consulting services for cities and counties nationwide. DTA has a long history of delivering projects on a timely basis and adhering to agreements. We encourage you to contact our references to learn firsthand how well DTA staff meets the needs of our clients.

C.1 Numerous Special Districts in Utah

Table 2: Reference Information

Location	State of Utah
Contact Name	Brennen Brown, Managing Director, Public Finance
Address	95 S. State St., Ste. 1500, Salt Lake City, UT 84111
E-mail Address	(801) 994-3166
Phone Number	BSBrown@DADCo.com
Key Project Staff	Kuda Wekwete (Project Manager), Jonathan Saba (Task Specialist), and Kyle Martinez (Task Specialist)
Date of Service	January 2020-Ongoing

DTA has assisted with the formation of a number of districts in the State of Utah, including Benloch Ranch Improvement Association Nos. 1 and 2, Brixton Park Improvement Association No. 1, Treehouse Park Improvement Association No. 1, Wood Ranch Public Infrastructure District No. 1, Black Desert Public Infrastructure District No. 1, and Three Bridges Public Infrastructure District No. 1, all of which are bonded districts. Additionally, DTA currently administers these districts.

DTA's Improvement Area and Public Infrastructure District administration responsibilities include parcel database development, maintenance, and updates; the determination of the annual budget, including detailed financial reconciliation of prior year revenues and expenditures and assessment installment calculations; preparation of payoff calculations and bond call redemption instructions; coordination with the trustee; the management of

the billing and collection of assessment installments; and quarterly reporting requirements.

C.2 City of Greeley

Table 3: Reference Information

Location	City of Greeley, CO
Client Contact	Tyra Litzau, Director of Finance
Address	1100 10th Street, Greeley, CO 80631
E-mail Address	Tyra.Litzau@GreeleyGov.com
Phone Number	(970) 381-4777
Key Project Staff	Kuda Wekwete (Principal-in-Charge) Hector Perez (Project Manager), Kyle Martinez (Task Specialist), and Richard Ruiz (Task Specialist)
Project Dates	February 2025-Present

DTA is conducting a comprehensive review of the City of Greeley's development code and perform a DIF study. All work to be completed will satisfy the requirements of the Colorado Revised Statutes §29-20-104.5 (the "Impact Fees Act"). The Impact Fees Act-compliant DIF Nexus Study would recommend the appropriate fee justification methodology and fee levels to support specific types of City-selected capital facilities needed to serve new growth, in addition to including data collection and the assessment of short- and long-term needs. The City currently assesses on-time DIFs on new residential, office, industrial, and retail projects, including Transportation, Police, Fire, Parks, Trails, Stormwater Drainage, Water, and Sewer DIFs.

In addition to the Citywide impact fee study, DTA was hired to conduct a complex DIF for a regional catalyst project with over a billion dollars in investments. This project will be specifically related to the General Improvement District ("GID") that the City intends to form around the area that encompasses the future site of the West Greeley/Cascadia project. This is set to bring new development to West Greeley and will include an arena, a youth hockey center, a water park, a hotel and convention center, and retail and residential infrastructure. The study will be used to assess the GID impact fee's ability to assist in the funding of regional infrastructure needs. DTA will analyze the various factors, including the City's existing impact fees, utility costs, population projections, land use, regional infrastructure needs, and all other relevant factors, to recommend a sufficient yet equitable impact fee with demonstrated nexus.

C.3 Pickens County

Table 4: Reference Information

Location	Pickens County, SC
Contact Name	Trad Julian, Planning Supervisor
Address	222 McDaniel Avenue, Suite B-10, Pickens, SC 29671
E-mail Address	TradJ@Co.Pickens.SC.US
Phone Number	(864) 898-5989
Key Project Staff	Kuda Wekwete (Project Manager), Steve Runk (Engineer), Richard Ruiz (Task Specialist), and Hector Perez (Task Specialist)
Date of Service	July 2023-Ongoing

In 2023, DTA was hired as a consultant by Pickens County, South Carolina, to provide a comprehensive study for the assessment and development of a County DIF program. The County does not currently have a DIF program and wanted DTA to determine the feasibility of implementing one. The purpose of the study was to evaluate and recommend appropriate fee justification methodologies and new fees with a legally supportable analysis based on current and projected demographics. The fees reviewed and recommended in this study included County Administration, Fire, EMS, Emergency Management, Roads and Bridges, Solid Waste, Library, Parks, and Sheriff's Department. A particular challenge in this fee study was that the County is in a region of the Country in which both the local government and developer communities are not very receptive to DIF programs.

C.4 City of Riviera Beach

Table 5: Reference Information

Location	City of Riviera Beach, FL
Contact Name	Randy Sherman, Director of Finance and Administrative Services
Address	600 W. Blue Heron Blvd., Riviera Beach, FL 33404
E-mail Address	RSherman@RivieraBeach.org
Phone Number	(561) 845-4045
Key Project Staff	Kuda Wekwete (Project Manager), Steve Runk (Engineer), Richard Ruiz (Task Specialist), Hector Perez (Task Specialist)
Date of Service	April 2021-Ongoing

DTA updated the City of Riviera Beach impact fee schedule for parks, recreation, police, fire, library, and transportation services pursuant to Florida Statutes 163.31801 (the "Florida Impact Fees Act"). In addition, DTA reviewed Florida's 2021 impact fee legislation, House Bill ("HB") 337, to provide and recommend best outcomes and practices for the City. To determine these updated costs, DTA conducted a detailed review of the City's budgets, Comprehensive Plans, Capital Improvements Plans, Facilities Master Plans, strategic goals, and any additional expansion of services to the community. **The City has full confidence in DTA's approach to impact fee analyses. As a result, the City has rehired DTA to update the previous calculations and scope of work.**

APPENDIX A

Town of Apple Valley, UT
Request for Statement of Qualifications
Impact Fee Facilities Plan Services



**SAMPLE DATA
REQUEST FORM**

MEMORANDUM

September 9, 2025

To: Town of Apple Valley, UT
From: DTA
Subject: Data Request/Information Form for Impact Fee Facilities Plan Services

1. Documents/Data Request by DTA (some items may be available online) for Impact Fee Facilities Plan ("IFFP") Services, including IFFPs for General Municipal Services and Parks and Recreation:
 - Latest General Plan (of particular interest, Housing Element or Land Use Element);
 - Any Specific Plan and/or Master Plan information;
 - Development Agreements and data regarding existing entitlements;
 - Capital Improvement Plan ("CIP") (approved or under review);
 - Any existing Impact Fee Study, Ordinance, and Fee Schedule;
 - Latest Parks, Recreation, and Open Spaces Plans, if available;
 - Impact Fee Annual Reports/3-Year Reports;
 - Current account balances for fees collected to date;
 - Population and development statistics;
 - CIP data for Parks, Recreation, and Open Spaces Plans, in addition to the Park Facilities Master Plan;
 - Residential Building Permits for the last 3 years (if available);
 - Commercial Building Permits for the last 3 years (if available);
 - Details on planned development projects;
 - Identification of offsetting revenue sources to fully understand financing options;
 - Identification of any committed revenue sources pledged to fund proposed facilities;
 - Annual Comprehensive Financial Reports ("ACFRs") for the last 3 years; and
 - Debt Obligations Reports, if separate from the ACFR(s).
2. If available, please provide a list of specific facilities/improvements (and total estimated cost in 2025 dollars) to be funded by the municipal services impact fees. For each improvement:
 - Identify whether the improvement is listed in an approved planning document (e.g., General Plan, Specific Plan, or Master Plan) as a necessary facility to serve new development and, if so, list the specific document(s); and
 - If not listed in an approved planning document, please provide the rationale for the specified improvement and a listing of the Town's current inventory of similar improvements in operation in the Town.
3. If there isn't a list of specific improvements required for new development, please identify the required service standard. For each standard:
 - Identify the approved planning document(s) justifying such standards; and
 - Provide information on the existing standard (e.g., existing park acres per 1,000 residents, based on the current population). The Town may also provide necessary data for DTA to calculate/verify standards (e.g., for parks, an inventory of existing parks and associated acres).

For more information about this Data Request Form, please contact Hector Perez by e-mail at Hector@FinanceDTA.com or by phone at (919) 247-9449. Thank you!



8117 PRESTON ROAD, SUITE 300
DALLAS, TX 75225
PHONE: (800) 969-4DTA

Public Finance
Public-Private Partnerships
Development Economics
Clean Energy Bonds

APPLE VALLEY

Impact Fee Facility Plans

September 10, 2025

September 10, 2025

Town of Apple Valley
Attn: Michelle Kinney, Finance Director
1777 North Meadowlark Drive
Apple Valley, Utah 84737

RE: Impact Fee Facilities Plans – General Municipal Services (CIB) and Parks & Recreation (ORPA)

Dear Town of Apple Valley and Selection Committee:

We are excited to work with the Town of Apple Valley to provide the award-winning service and professional expertise for which Sunrise Engineering is known. Our interest in this project comes from our familiarity with your community, your residents, your culture, and your infrastructure needs. We have enjoyed working with the Town of Apple Valley on prior projects, and we appreciate our ongoing work. Our qualifications are based on a host of capital improvement plans and impact fee experience on projects exactly like this one. We are responding to BOTH the general municipal services IFFP (CIB Funded) and the Parks & Recreation Master Plan with IFFP (ORPA Funded).

The scope of work includes evaluating and inventorying existing infrastructure to come up with the existing level of service. Growth projections and demand modeling will be performed to identify future needs and recommend viable capital improvements. The Capital Improvements Plan impact fee will have a 6-to 10-year window for improvements. Impact fee calculations and methodology will be in accordance with the Utah Code.

The plan will incorporate existing planning documents, coordination with municipal entities within the town, and include a public involvement process. Regular communication and progress reporting to the Town of Apple Valley will be maintained throughout the project. The final deliverable will include prioritized projects, cost estimates, funding strategies, and quality assurance measures, recommended ordinance language and adoption support, GIS maps, spreadsheets, and supporting documentation, culminating in a capital facilities plan that the Town of Apple Valley can adopt. Additionally, Sunrise Engineering will add the inventoried infrastructure to Apple Valley's GIS network.

Sunrise has extensive experience helping communities secure funding for their projects. We have funding specialists who know the current grant market and have successfully helped create plans for potential funding options to implement the projects in the impact fee facility plans. Sunrise will implement this process for all impact fees. Specific items for each impact fee are listed below. Some highlights for the plans are listed below:

Parks and Recreation Plan

The town wants to plan for its parks and recreation facilities as it prepares for a potential tripling of its population. The proposed subdivisions will require a significant increase in recreational amenities, including new parks and a recreation center, to support this growth.

Our team is well-equipped to assist with this project. We specialize in parks and recreation master planning and have extensive experience in this area. Our team includes G. Brown Landscape Architects, who will create detailed, colored renderings of the proposed parks. These visuals will help the community and council members envision the plans and build support for the project.

We will collaborate with the town to incorporate the specific recreation elements it desires and will develop several design concepts. After the town chooses a final concept, we'll create a comprehensive plan that includes color renderings for the proposed parks.

To ensure the plan reflects the community's needs, we can create surveys for distribution to gather public input. We can then compile data from residents to prioritize the desired improvements. We also stay current on state trends by reviewing the Utah Statewide Comprehensive Outdoor Recreation Plan to include amenities that are gaining popularity across the state.

The parks and recreation plan will play a significant role in the stormwater master plan. The proposed parks have drainage concerns, and this plan will inventory and map the town's existing storm drain infrastructure, particularly as it relates to the parks. This data will be used in conjunction with the comprehensive stormwater master plan to ensure adequate drainage planning for all new park areas.

Public Safety Plan

The current Apple Valley town hall and fire department are combined in one building. The town's growth will likely lead to a need to expand its public safety infrastructure. The town is also looking at a potential recreation center in the future that could be a multipurpose town hall building. The public safety plan will look at what the needed space will be for future growth.

Transportation Plan

The transportation plan will focus on the arterial roads throughout the community. Apple Valley is currently dispersed among different communities, and the road connectivity between the communities has not been fully planned for. We will collaborate with the town to develop an arterial transportation network that efficiently moves traffic throughout the town. The plan can be used to help organize the future development that is being planned and to make sure that the town's traffic will flow well in the future.

We look forward to working with the Town of Apple Valley on this important project. Please call me at 435.215.1955 with any questions.

Sincerely,



Sunrise Engineering
Nate Wallentine, PE
Project Manager
nwallentine@sunrise-eng.com
435.215.1955

Company Overview



PROJECT MANAGER

 Nathan Wallentine, PE
 11 North 300 West
 Washington, Utah 84780
 435.215.1955
 nwallentine@sunrise-eng.com

SUNRISE OFFICES

UTAH

- » Cedar City
- » St. George
- » Logan
- » Fillmore
- » Nephi
- » Richfield
- » Roosevelt
- » Salt Lake City
- » South Ogden
- » Utah County
- » Vernal

ARIZONA

- » Phoenix Metro
- » Prescott
- » Kingman

IDAHO

- » Pocatello

NEVADA

- » North Las Vegas
- » Henderson

COLORADO

- » Fort Collins
- » Alamosa

WYOMING

- » Cheyenne
- » Laramie
- » Star Valley
- » Kemmerer

Since 1978, Sunrise Engineering, LLC has been working alongside clients to create solutions that don't just work on paper, they work for you. We focus on what matters most to your project: balancing performance and cost, meeting deadlines, and delivering results that stand the test of time. Nearly five decades in the industry have taught us one thing, it's all about the relationships we build. We aim to build trust with every client so that they turn to us time and time again, confident we'll deliver the results they need.

With a team of nearly 500 professionals, including 50 licensed engineers, we bring a wealth of knowledge and hands-on experience to every project. Whether it's designing smarter infrastructure, ensuring compliance, or supporting your community's growth, we have the expertise to make your vision a reality. We know the ins and outs of working with local, state, and federal agencies, which means fewer headaches for you and a smoother path to project completion.

Operating from 23 offices across the western United States, we're never far when you need us. At Sunrise, we pride ourselves on being more than just a consultant, we are a partner invested in your success. When you choose Sunrise Engineering, you're choosing a team that's dedicated to helping you achieve your goals every step of the way. In addition to traditional engineering services, Sunrise offers integrated capabilities like GIS mapping, funding assistance, and environmental planning to streamline project execution. At Sunrise, we are committed to delivering innovative, cost-effective solutions that address today's demands while preparing your system for future challenges.

AREAS OF EXPERTISE



Stormwater Systems	Parks & Recreation	Transportation	Electrical	Water
Land Development	Environmental	Structural	Wastewater	Construction Management



Utility Mapping	Cemetery Management	Trails & Transportation	Land Use Management
Field Collection	Mapping, Management, & Analytical Services	Cloud Smart GIS	



Community Planning	Economic Development	Environmental Planning	Public Involvement
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3D Imaging	Topographic	Construction Layout	Land Boundary/Easements/Right-of-Way
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Training & Qualification	Compliance & Studies	Pipeline Engineering	3rd Party Inspections	As-Built Mapping
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Building Inspection	Plan Review	3rd Party Inspections	Peer Reviews & Code Consulting
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Firm Qualifications | Experience with State of Utah Impact Fees Act

Sunrise Engineering brings a strong track record of preparing comprehensive and defensible impact fee facilities plans (IFFPs) and impact fee analyses (IFAs) for communities throughout the region. As we reviewed your RFQ, we recognized that your project includes many of the same components—and even some of the same challenges—we’ve successfully addressed in other municipalities. The following project summaries highlight our experience in every major service category outlined in your RFQ: water, wastewater collection, wastewater treatment, parks and recreation, municipal power, and transportation. Our team has successfully delivered similar efforts for both rapidly growing and well-established communities, ensuring compliance with Utah’s Impact Fees Act while tailoring solutions to each city’s unique infrastructure, growth projections, and financial goals.

By selecting Sunrise, you are selecting a well-rounded and highly experienced team with the expertise, technical depth, and resources necessary to deliver a clear, legally sound, and community-focused impact fee plan.

PARKS AND RECREATION

APPLE VALLEY IMPACT FEES & GENERAL PLAN | Parks & Recreation & GIS Utility



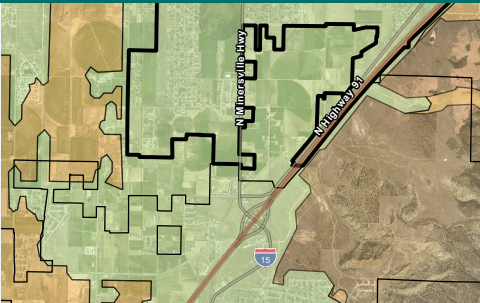
Parks & Recreation: A Parks and Recreation Impact Fee Facilities Plan was prepared. The plan included looking at the current level of service provided by the parks and extending that level of service out to a 20-year horizon. Existing parks and trails in Apple Valley were mapped. Recommendations were given to maintain an appropriate level of service out to a 20-year horizon. Existing parks and trails in Apple Valley were mapped. Recommendations were given to maintain an appropriate level of service. Cost estimates were created for these recommendations.

GIS Utility: All Apple Valley utilities, zoning, and parcel data were placed into Sunrise’s Cloud SMART GIS System. Training was provided to Apple Valley on how to use the system.

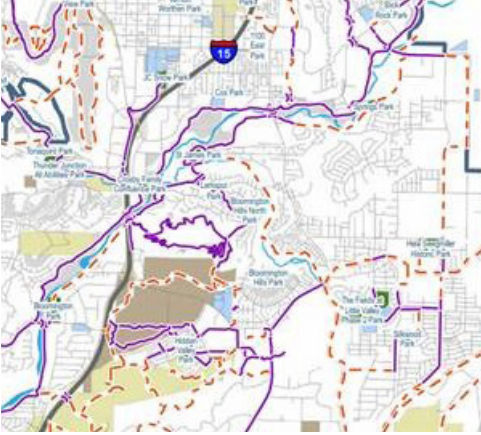
General Plan: Apple Valley selected Sunrise experts to help them create a strong land use and zoning element within their General Plan, in addition to infrastructure, transportation, housing, economic development, and annexation elements. The General Plan included research and a vision supported by robust citizen participation, including open houses, public meetings, and surveys. Working and communicating with adjacent agencies like UDOT, BLM, and SITLA was critical during this process. Our planner used the best available data, professional planning best practices, and technology to create a tenable and implementable plan that will guide the growth Apple Valley is experiencing.

ENOCH MASTER PLAN | Parks & Recreation

Sunrise was contracted with Enoch City to complete a parks and recreation impact fee facilities plan. This included performing a growth projection, establishing an existing and future level of service, and comparing the city’s parks and trails offerings against guidelines from the National Recreation and Park Association. The perceived level of service was also considered based on the city’s proximity to natural outdoor recreation. Recommendations were given for additional parks and trails for Enoch to add to their existing facilities to support 20-year growth and meet the desired level of service. A maximum allowable impact fee was established to fund the eligible portions of these projects.



ST. GEORGE PARKS & REC, ARTS, & TRAILS MASTER PLAN | Parks & Recreation



Sunrise was retained as a subconsultant to Conservation Technix, Inc. to assist in updating the City's existing master plan from 2006. Sunrise advised the project team on existing and planned recreation facilities and local cultures and trends, participated in the community engagement program, and prepared project cost estimates based on local construction costs for proposed improvements.

The purpose of the master plan was to create a current vision for an innovative, inclusive, and interconnected system of parks, trails, and open spaces that promote recreation, health, and conservation as integral elements of a thriving, livable St. George. To create the master plan, Sunrise analyzed the community profile, collected public input, tabulated the City's key goals for its leisure services system, took an inventory of existing recreational facilities, identified current and future needs for parks, open space, recreation centers, and the arts. An implementation plan was suggested for near-term projects identified as critical in the plan.

IVINS CITY PARKS & REC MASTER PLAN | Parks & Recreation

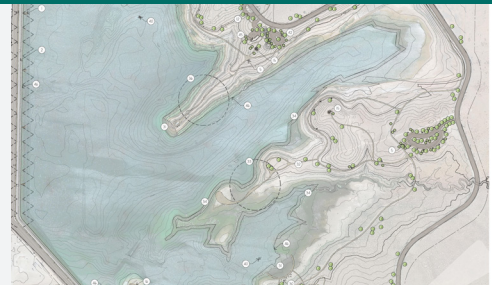


The City of Ivins retained Sunrise Engineering through a statement of qualifications process as the firm most qualified to assist in completion of a city-wide comprehensive parks and trails master plan, impact fee facilities plan, and impact fee analysis.

Sunrise worked closely with city staff to plan for future facilities and ensure the city's vision for parks and trails was captured in the master plan. An inventory of the existing facilities and amenities was completed. Levels of service were calculated in accordance with NRPA standards, and proposed improvements were recommended to maintain existing levels of service as growth occurs in the community. Finally, an impact fee facilities plan and analysis was completed to establish maximum impact fee levels and ensure the financial viability of the city's recreational system.

KCWCD JACKSON FLAT CONCEPT PLANNING | Parks & Recreation

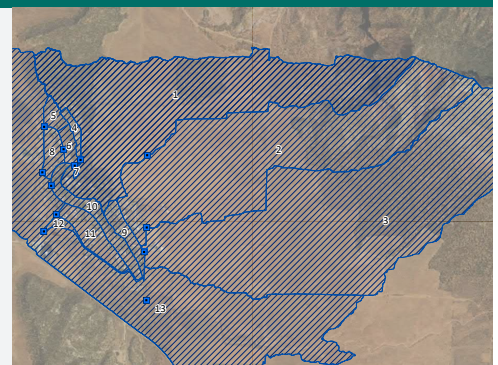
Kane County Water Conservancy District is looking to improve the Jackson Flat reservoir and provide more amenities to the community. Sunrise was contracted to design a concept plan to include various amenities, such as an amphitheater, boardwalk, pickleball courts, bike repair station, and lounge nets, as well as other beach attractions and water entrances. Some existing recreation features, such as the disc golf course, will be relocated as part of the plan. Additionally, our concept design took into account the potential for high water levels to ensure the amenities are accessible and usable all year.



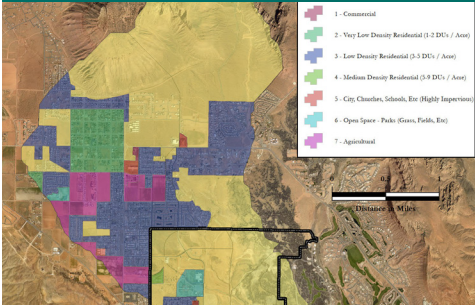
STORMWATER

APPLE VALLEY IFFP & IFA | Stormwater

Apple Valley has had reoccurring flooding problems throughout portions of town, and contracted with Sunrise to analyze solutions to stop the flooding. Apple Valley has steep cliffs with sandy, loamy soil creating prime conditions for flash flooding. Sunrise modeled the town using GIS and HEC-HMS. The three-hour storm with a 15-minute intensity was used to model as close as possible to the actual monsoon rains. The majority of the existing infrastructure was made up of borrow ditches and culverts. The town wanted to keep many of these features to maintain a rural feel to the town. Improvements were made to keep residents happy with the look of town but also to convey water away from the flooding prone areas so future flooding wouldn't be a problem. Sunrise worked with Lewis Young Robertson & Birmingham to complete an impact fee facilities plan for the improvements.



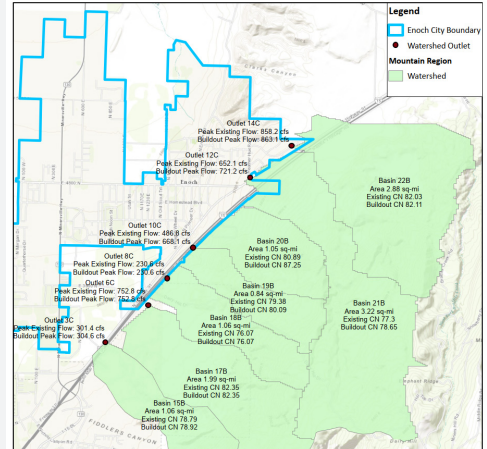
SANTA CLARA STORM DRAIN MASTER PLAN & IFA | Stormwater & Drain



Sunrise has completed multiple stormwater master plans for Santa Clara, including the original plan (1996) and an update in 2013. The city selected Sunrise for a new stormwater master plan that includes an impact fee facility plan and impact fee analysis. This newly updated plan places a significant focus on the storm drain needs for several new developments in the city. The plan also provides options for older parts of the city where previous diversion methods (irrigation channels) are no longer feasible. Recommendations and improvement options will be provided to Santa Clara, along with a recommended maximum allowable impact fee, opinions of probable costs, a financial viability analysis, and policy recommendations.

ENOCH MASTER PLAN | Stormwater Master Plan

Sunrise was retained by Enoch City to prepare a stormwater master plan, as an update to the prior plan prepared by Sunrise, to address and propose solutions to existing system deficiencies and mitigate future issues. The plan included GIS and survey aspects such as grade field collection, database creation and mapping, conversion, attribution, and GIS CloudSMART integration and mapping. A hydrologic model was made for each study area, including digital elevation data, land use data, and soil data to set up the model to evaluate existing and build-out conditions. The model output was used to determine the scope and scale of recommendations. The plan also included current drainage and conveyance issues, peak flow analysis (including snow pack), and drainage basin delineation. The final reports included recommended improvements and future plans, opinions of probable costs, a financial viability analysis, and policy recommendations. These reports were delivered to Enoch City for implementation, planning, and reference.



LAVERKIN CITY STORM WATER MASTER PLAN | Stormwater

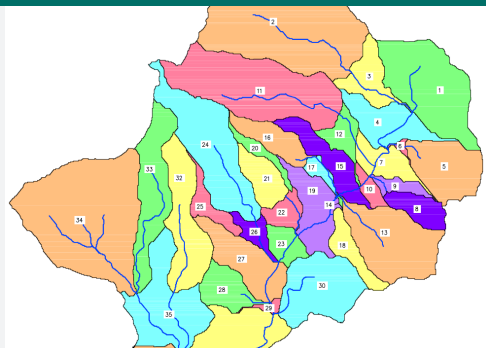


LaVerkin contracted Sunrise to provide a stormwater master plan update to their 2010 plan. The master plan focused on addressing deficiencies of the existing stormwater system and anticipated impacts from growth. HEC-1 was used for the hydrologic model for existing and buildout scenarios for the lower bench area. The existing storm drain system capacity was analyzed, and areas of the city were found to be undersized. The areas found to have undersized infrastructure correlate with the areas that experience regular flooding. The plan included recommended capital improvement projects to increase the storm drain capacity to handle existing and anticipated buildout flows. We provided cost estimates for each recommended project, which were used for a user rate analysis, an impact fee facilities plan, and impact fee analysis. The plan included recommendations on an updated user rate and impact fee. Coordination with city staff and city council included workshops and presentations.

SPRINGDALE STORM WATER MASTER PLAN & IFFP | Stormwater & Drain

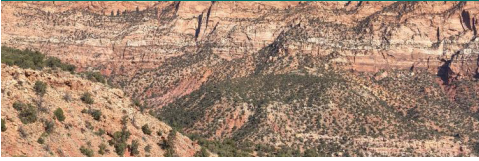
Sunrise completed the original storm water master plan for Springdale and is now preparing the update. The plan shed light on several items required for managing and conveying storm water produced within the Town and surrounding areas. The plan consisted of a review of existing data and boundary constraints, existing storm water conveyance facilities, a review and determination of future land use plans, and a storm water model of existing and future storm water flows.

Sunrise provided recommendations for future planning and a probable cost for improvements. We determined an impact fee for the storm water system and prepared a written report with all findings and recommendations for the Town to reference as they experience growth in the coming years.



TRANSPORTATION

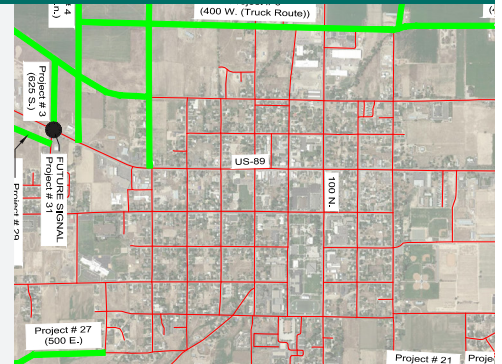
APPLE VALLEY TRANSPORTATION PLAN | Transportation



A Road/Streets Plan was created for the town of Apple Valley. The plan focused on expanding roads to match the anticipated future growth that is expected in Apple Valley. Based on zoning plans and planned developments, recommendations for roads were proposed. Cost estimates were created for these recommendations.

EPHRAIM TRANSPORTATION MASTER PLAN UPDATE | Transportation

Sunrise initially prepared the Roadway Facilities Plan and Impact Fee Analysis for Ephraim City and later updated it to reflect changing conditions and growth trends. The plan supports transportation planning and financial decision-making for the city's service area, which has experienced significant growth over the past two decades. It includes analysis of existing roadway conditions, current and future land use, and traffic projections. The study identifies necessary capital improvements, provides cost estimates, prioritizes projects, and evaluates funding options. It also determines the portion of improvements attributable to new development and calculates the maximum allowable impact fee. The planning process incorporated public input through public workshops and feedback from the City Council and Planning Commission, culminating in a finalized report for adoption.



BEAVER COUNTY GENERAL & MASTER TRANSPORTATION PLAN | Transportation

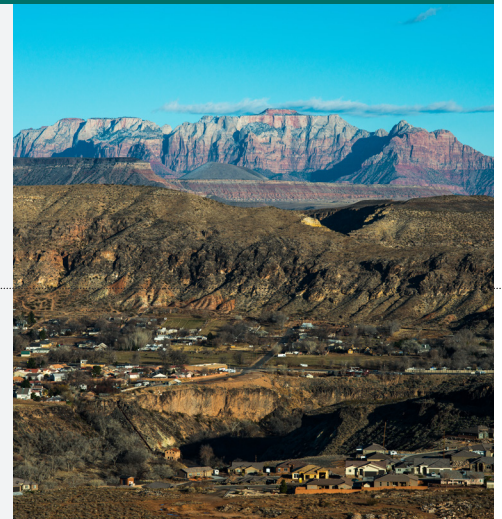


Sunrise completed a general and transportation master plan update for Beaver County. We met with county staff and elected officials to discuss their ongoing needs, concerns, and perennial problems that needed to be addressed. Additionally, we met with staff and elected officials from each municipality and talked about their items of importance and the critical collaboration between their groups. As part of the transportation master plan, Sunrise addressed transportation demands including freeway interchanges, capital improvements, and active transportation needs. The plan is a conglomerate of the inputs received from the county as well as the local jurisdictions and multiple data sets gathered during the project, including existing conditions network constraints, future conditions and growth forecasts use, safety, internal circulation, active transportation, regional access and I-15 interchanges and crossings, street designs, access management, and improvement projects (5-year and 20-year) maintenance.

LAVERKIN CITY TRANSPORTATION MASTER PLAN, IFFP, & IFA | Transportation

Sunrise Engineering was retained by LaVerkin City to update its transportation master plan, IFFP, and IFA to address changes in population, development, and infrastructure conditions. The project included comprehensive data collection, traffic counts, and development of a travel demand model calibrated to local and regional conditions using DMPO and UDOT planning data. The analysis evaluated existing and future roadway and intersection level-of-service over 10-, 20-, and 30-year planning horizons.

This effort supported the city's infrastructure planning and impact fee updates in compliance with the Utah Impact Fees Act. The plan identified capital improvements, calculated the maximum allowable impact fees based on future capacity needs, and provided recommendations for ordinance updates and transportation-related policies. The project also referenced regional plans and anticipated growth on the city's upper bench and surrounding areas. The final deliverables included a layperson summary, an impact fee certification, and a planning tool to guide future investment. The project was partially funded through UDOT's Technical Planning Assistance (TPA) program.



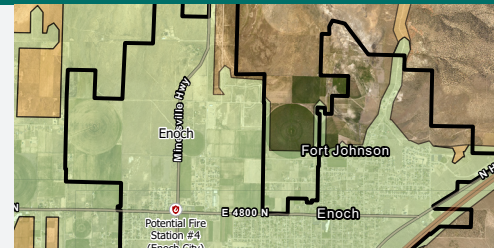
KANE COUNTY TRANSPORTATION PLAN | Transportation



Increased visitation in Utah's national parks has strained the existing transportation infrastructure in surrounding communities. Kane County is on the front lines of these needs and in 2021 Kane County selected Sunrise to assist with an active transportation plan for sections of State Route 9 and Highway 89, which connect Zion National Park, Kane County communities, and the corridor to Bryce Canyon. This study first quantified existing needs and projects underway in these areas and then identified specific routes parallel to the highways that will connect the park and points of interest, lodging, housing, and other amenities in the area. The project was broken into phases and prioritized for feasibility and timeline so could be pursued for each section outlined in the implementation plan. Coordination with UDOT, BLM, Kane County, Kanab City, Town of Orderville, private property owners adjacent to the highways, and the public took place through the process.

ENOCH MASTER PLAN | Transportation Master Plan

An impact fee analysis was conducted for Enoch City. This included a level of service projection for existing and future average daily trip demands on the city's transportation facilities. Capital improvements were determined to be impact fee eligible based on Sunrise's knowledge and compliance with the Utah Impact Fee Act. This plan resulted in determination of a maximum allowable impact fee that fairly accounts for the demand future growth will place on Enoch's infrastructure and assist in funding improvements that support future growth.



PUBLIC SAFETY

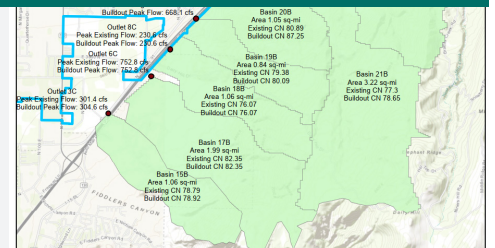
WASHINGTON CITY PUBLIC SAFETY PLAN | Public Safety



Washington City Public Safety IFFP/IFA project we reviewed available census data and building permit history to establish the existing population and calculate growth projections. Existing and projected demands for the public safety facilities in the City were quantified. The existing level of service of the public safety facilities was determined and a desired level of service for those facilities was defined. The maximum impact fee for public safety facilities was then calculated based on development and growth.

ENOCH MASTER PLAN | Public Safety Master Plan

Enoch City enlisted Sunrise to prepare a public safety impact fee facilities plan for the city. Sunrise prepared growth and demand projections for the existing facilities based on existing and 20-year future population. The demand projection included establishing a level of service for public safety building area per person. Emergency service response times were given consideration as well when projecting growth and locating new facilities. Facility recommendations were made, and a Maximum Allowable Impact Fee was established.



We have completed several hundred IFFPs, IFAs, and studies throughout the intermountain west. The projects below showcase some of our history working with Utah communities on impact fee facilities plans and master plans.

SUNRISE ENGINEERING IFFA & IFFP PROJECTS	Areas of Expertise								
	Impact Fee Analysis	Stormwater	Wastewater	Transportation	Water	Recreation	Public Safety	Secondary Water	Multiple
Apple Valley Master Planning & IFFP	•	•							
Toquerville Transportation Master Plan, IFFP & IFA	•			•					
Alton Town Culinary Water Master Plan	•				•				
Orderville Transportation Master Plan, IFFP, & IFA	•			•					
Orderville Culinary Water Master Plan, IFFP, & IFA	•				•				
LaVerkin Transportation Master Plan, IFFP, & IFA	•			•					
KCWCD Wastewater Reuse Feasibility Study			•						
Kanarrville Culinary Water Master Plan, IFFP, & IFA	•				•				
LaVerkin Culinary Water Master Plan, IFFP, & IFA	•				•				
Santa Clara Parks & Trails Master Plan	•					•			
Virgin Town Groundwater Protection Study			•		•		•	•	•
Enoch City Stormwater IFFP	•	•							
Toquerville Culinary Water Master Plan & IFFP	•				•				
Santa Clara Parks IFFP Amendment	•					•			
Springdale Parks and Recreation Master Plan Update	•					•			
Beaver Dam Village SSD Culinary Water Master Plan					•				
Washington City Culinary Water Master Plan	•				•				
LaVerkin Stormwater & Irrigation System Master Plans	•								•
Big Water Wastewater Master Plan	•		•						
Hildale City Culinary Water Master Plan & IFFP Update	•				•				
Virgin Town Wastewater Study Update			•						
Santa Clara Culinary & Irrigation Master Plans	•								•
Cedar City Stormwater Master Plan		•							
Big Plains Water SSD Master Plan & IFFP	•				•				
Springdale Wastewater Treatment Compliance Plan			•						
Big Water IFFP & IFA	•				•				
Santa Clara Stormwater Master Plan Update	•	•							
Santa Clara Wastewater IFFP	•		•						
Enoch Recreation IFFP & IFA	•					•			
Ivins Parks & Trails Master Plan Update	•					•			
Hildale Culinary Water Impact Fee	•				•				
Clark Bench Culinary Water Master Plan	•				•				
Angell Springs Water Master Plan & IFFP	•				•				
Ivins City Public Safety IFFP & IFA	•						•		
Enoch Public Safety IFFP & IFA	•						•		
VVWD Culinary Water Master Plan Peer Review					•				
LCWD Water Resource Plan Update					•				
KCWCD Wastewater IFFP & IFA	•		•						
Springdale Stormwater Master Plan Update	•	•							
Springdale Wastewater Master Plan	•		•						

SUNRISE ENGINEERING IFFA & IFFP PROJECTS	Areas of Expertise								
	Impact Fee Analysis	Stormwater	Wastewater	Transportation	Water	Recreation	Public Safety	Secondary Water	Multiple
Minden Arsenic Mitigation Plan					•				
Springdale Town Irrigation Master Plan	•							•	
LaVerkin Secondary Water Feasibility Study					•				
Santa Clara Public Safety Master Plan	•						•		
Washington City Public Safety IFFP & IFA	•						•		
Enoch Culinary Water Impact Fee Plan	•				•				
Washington City Secondary Water Master Plan Update	•							•	
KCWCD Culinary Water Master Plan	•				•				
Santa Clara Parks & Trails Master Plan Update	•					•			
Hildale Culinary Water Master Plan	•				•				
Paragonah Culinary Water Master Plan	•				•				
St. George Parks, Trails & Recreation Master Plan						•			
Summit Water Master Plan	•				•				
Santa Clara Culinary Water IFFP & IFA	•				•				
Washington Parks Master Plan Update	•					•			
Washington City Secondary Water Master Plan Update	•				•				
Enoch City Wastewater IFFPA	•		•						
Enoch City Stormwater IFFPA	•	•							
Minden Town Culinary Water Master Plan					•				
MVWD Culinary Water CIP					•				
Washington City Culinary Water Master Plan	•				•				
Ivins City Parks & Trails Master Plan	•					•			
Orderville Culinary Water Master Plan	•				•				
Washington Fields Pressurized Irrigation Feasibility Study								•	
Parowan City Culinary Water Master Plan	•				•				
Hildale Wastewater Facility Plan			•						
Parowan City Trails Master Plan						•			
Washington Wastewater Master Plan Update	•		•						
Panguitch City Trails Master Plan						•			
Colorado City Stormwater Master Plan	•	•							
LaVerkin Water Master Plan	•				•				
Colorado City Water Master Plan	•				•				
Colorado City Wastewater Master Plan	•		•						
Springdale Culinary Water Master Plan Update	•				•				
Lincoln County Stormwater CIPs		•							
Big Water Culinary Water Master Plan	•				•				
Pioche Stormwater CIP		•							
Santa Clara Transportation Master Plan	•			•					
Hildale City Water Impact Fee Plan & Analysis	•				•				
Washington City Parks & Recreation IFFPA	•					•			
Rockville Culinary Water Master Plan					•				
Washington City Public Safety Impact Fee	•						•		
Santa Clara Parks & Trails IFA	•					•			

SUNRISE ENGINEERING IFFA & IFFP PROJECTS	Areas of Expertise								
	Impact Fee Analysis	Stormwater	Wastewater	Transportation	Water	Recreation	Public Safety	Secondary Water	Multiple
Santa Clara Stormwater Master Plan Update	•	•							
Santa Clara Public Safety & Wastewater Impact Fee Update	•								•
KCWCD Duck Creek Wastewater Facility Plan Update			•						
Springdale Parks & Recreation Impact Fee Plan	•					•			
Lincoln County RTC CIP				•					
Caliente Transportation CIP				•					
Washington City Wastewater Master Plan	•		•						
Caliente Culinary Water CIP					•				
Coyote Springs-LCCGID Alternative Scenarioe CIPs					•				
Enterprise Master Plan Updates	•								•
Leeds Stormwater Master Plan		•							
Coyote Springs-LCCGID Transportation CIP				•					
Coyote Springs-LCCGID Stormwater CIP		•							
LaVerkin Stormwater Master Plan	•	•							
LaVerkin Irrigation Master Plan	•							•	
Coyote Springs-LCCGID Secondary Water CIP								•	
Coyote Springs-LCCGID Wastewater CIP			•						
Washington Water Master Plan Update	•				•				
Santa Clara Culinary Water Master Plan	•				•				
Coyote Springs-LCCGID Culinary Water CIP					•				
Washington Wastewater Master Plan Update	•		•						
LaVerkin Culinary Water Master Plan	•				•				
Dixie Deer Water Master Plan	•				•				
Springdale Stormwater Master Plan	•	•							
Springdale Wastewater Master Plan	•		•						
Springdale Culinary Water Master Plan	•				•				
KCWCD Alton Town Culinary Water Master Plan	•				•				
Toquerville City Transportation Master Plan	•			•					
Toquerville Water Master Plan	•				•				
Santa Clara Water Master Plan Update	•				•				
KCWCD Duck Creek Wastewater Planning Study			•						
LDWA Water Master Plan	•				•				
Gunlock SSD Impact Fee Analysis	•				•				
Santa Clara Parks & Public Safety Master Plan	•								•
Enterprise City Master Planning	•								•
Santa Clara City Stormwater Master Plan	•	•							
Washington City Master Plans	•								•
Fredonia Town Water Master Plan Update	•				•				
Kanarraville Town Culinary Water Master Plan	•				•				
Santa Clara City Water Impact Fee Analysis	•				•				
Fredonia Culinary Water Master Plan	•				•				
Big Water Transportation Master Plan				•					
Enoch Transportation IFFP& IFA				•					

Project Team

At Sunrise, we understand that when you select a firm, you are ultimately selecting people - people that will make the difference in a successful project outcome. For your project, we have assembled a team of key personnel to manage the key issues of your project along with a robust support staff that will achieve your schedule goals. This team will be led by Nathan Wallentine, PE, and supported by our team, which has over 50 years of combined experience assisting communities with their planning and impact fee analysis. This Sunrise team has conducted numerous IFFAs and IFAs.

Our team is fully committed to dedicating the time and expertise necessary to this project, ensuring all timelines and deliverables are met with the highest standard of quality and reliability.



Understanding of Project Scope & Approach

All plans will include the following approach.

COMMUNICATION & STAKEHOLDER ENGAGEMENT

Effective communication is essential for the success of this study. Our team will maintain open and transparent communication with the town of Apple Valley, its stakeholders, and the public throughout the project's duration. Our communication strategy includes:

- **Regular Progress Reports:** We will provide periodic updates on project milestones, data collection efforts, and key findings to the town staff.
- **Stakeholder Meetings:** We will engage with community leaders, government officials, youth sports organizations, and other key stakeholders to gather input and ensure alignment with community needs.
- **Public Engagement Opportunities:** We will offer multiple opportunities for community feedback, including public workshops and surveys, to incorporate local insights and priorities into our recommendations.

DATA COLLECTION AND BASE MAPPING

We propose that the first phase involves gathering and evaluating relevant data to establish a comprehensive understanding of the existing community demographics and needs. Key activities include:

- **Demographic and Economic Data:** We will acquire recent and projected population data, age distribution, household income, and other relevant demographic information to understand the current and future service population.
- **Mapping Existing Infrastructure:** We will compile and prepare preliminary GIS-based maps detailing existing infrastructure.

DEVELOPMENT OF IMPROVEMENTS

Based on evaluations, Sunrise will propose solutions to address identified deficiencies and needed modifications. This will involve:

- **Identification of Improvement Measures:** We will recommend system upgrades based on study findings.
- **Preliminary Cost Projections:** Sunrise will estimate costs for proposed improvements, including construction, materials, and maintenance considerations. Sunrise adds specific value to this task through its database of actual construction costs; each time Sunrise administers a client's project in construction, we compile the bid prices for elements in the project, including storm drain elements. Referring to actual costs for improvements on prior projects, it ensures that our cost projections are comprehensive and accurate.

- **The Capital Improvements Plan** impact fee will have a 6-to-10-year window for improvements. Impact fee calculations and methodology will be in accordance with the Utah Code.

FINANCIAL ANALYSIS

A financial evaluation will be conducted to assess current conditions and funding mechanisms to build, operate, and maintain the town's infrastructure. The objective is to forecast and ensure the long-term financial sustainability of Apple Valley's infrastructure. Funding mechanisms considered may include user rates, connection fees, development partnerships, public funding agencies, and other strategies. This task will include:

- **Preparation of Opinions of Project Costs:** We will develop cost estimates for operation and maintenance objectives and recommend infrastructure improvements.
- **User Rate Analysis:** We will evaluate the fiscal impact of utility fees, considering affordability and revenue generation. This analysis will include a first-year debt service analysis if the town envisions moving forward with any infrastructure improvements recommended by the study.

PREPARATION OF MASTER PLAN REPORT

The final phase includes compiling the findings into a comprehensive report that will serve as a roadmap for improvements. The report will summarize the data, methodology, assumptions, conclusions, and recommendations related to Apple Valley. Specific sections of the report may comprise:

- **Executive Summary:** An executive summary of key findings and recommendations will provide a synopsis of the key issues identified through the study process.
- **Presentation of Detailed Analysis:** Detailed documentation of data collection, evaluations, calculations, proposed improvements, and the basis for recommendations will be included.



- **Mapping & Modeling Results:** GIS maps, modeling results, analysis charts, tables, and conceptual improvement schematics will support the analysis.
- **Administrative Recommendations:** Our recommendations related to ordinances, policies, design criteria, development standards, etc., will be represented.
- **Recommended Improvements:** Cost estimates and prioritization of recommended projects will be incorporated into the study.

PRESENTATION AND PROJECT CLOSEOUT

- **Draft and Final Report:** A draft report will be delivered to the town for review, consideration, and comment. Sunrise will discuss with the town any comments provided and will incorporate such comments into the report.
- **Town Council Presentation:** Sunrise will present the report and its findings, conclusions, and recommendations at one of the town's regular council meetings.
- **Project Closeout:** Following preparation of the final report and presentation to the Town Council, we will promptly deliver any final documents and supporting information to Apple Valley with the goal of closing the project out in a defined and meaningful way. We will also counsel with the town on the next steps to implement any improvements recommended by the study.

Stormwater Master Plan Approach

Our approach to the storm drain master plan will include an understanding of the existing storm water system, natural drainage patterns, the town's existing development standards, ordinances, and design criteria, and most importantly, the town's perspective on key issues and what outcomes the town perceives in a successful and valuable project. Key activities include:

- **Recent and Historic Storm Data Collection:** We will acquire precipitation records, flood history, and storm event data from meteorological and hydrological sources. We anticipate that our recent storm drain work in communities neighboring Apple Valley will inform this process; our local experience represents value added to the town.

INVENTORY OF EXISTING FACILITIES

Sunrise will perform a site visit and prepare a thorough inventory of current storm water infrastructure and facilities, ensuring an accurate assessment of existing conditions. This site visit will include a discussion with the town to identify current problem areas that require specific attention and solutions. Inventorying existing facilities involves:

- **Understanding Natural Drainages:** We will collect and review topographical data and field-verify natural watercourses, including alterations made over time through development activities. As part of the review, we will evaluate how existing alterations to and infrastructure in natural drainages support or impede effective drainage through the town. We will also collect anecdotal information at this stage from the town and project stakeholders; such information often reveals key issues that need specific attention.
- **Mapping Existing Infrastructure:** Following our site visit, we will finalize the mapping of culverts, storm drains, detention basins, outfall structures, and other features with notes on their current conditions. This GIS database and mapping will be available to you for future use following our completion of the study.

INCORPORATION AND REVIEW OF STORM WATER ORDINANCES AND DESIGN STANDARDS

Sunrise will plan to work with Apple Valley to incorporate drainage ordinances within the study. As an additional note, Sunrise has worked with many communities facing similar geography and hydrology, and could provide additional insight on what has been successful in other communities.

HYDROLOGIC EVALUATIONS

We have included on our project team a hydrologic modeling expert, Nathan Wallentine, your Project Engineer, who has performed or been involved in most of Sunrise's recent southern Utah hydrologic modeling projects. Nate will perform hydrologic analysis to quantify storm water runoff and evaluate the impact of various storm events on the town's infrastructure under existing and future development conditions. This work includes:

- **Modeling Existing Conditions:** We will develop a hydrologic model using industry-standard software to simulate runoff generation, flow rates, and drainage patterns under different storm scenarios and differing development conditions.

HYDRAULIC EVALUATIONS AND IDENTIFICATION OF PROBLEM AREAS

A hydraulic analysis will assess the capacity of existing storm water infrastructure, including pipelines, culverts, and any detention or retention facilities, and identify deficiencies. Key tasks in this phase of the work include:

- **Determination of Capacity and Overtopping Potential:** We will calculate the flow capacities of storm drains, channels, and culverts and assess overtopping risks under peak storm conditions.

- **Delineation of Areas with Inadequate Capacity:** We will identify bottlenecks, undersized structures, and flood-prone locations requiring improvement. This task will potentially: 1) identify new locations requiring attention and 2) confirm problem areas identified previously by the town and project stakeholders.
- **Modeling Local Conditions:** Apple Valley rests at the base of Hurricane and Gooseberry Mesas. The top of the mesas is conglomerate rock from the Shinarump formation. This layer is very rocky and does not allow much water into the ground. The sloped portion of the mesas is in the Moenkopi Formation, which consists primarily of silts and clays. This composition results in limited water infiltration and rapid runoff during storms. The local region around these mesas has a long history of flooding. Our modeling approach will leverage local knowledge to accurately plan for the specific flooding patterns that are common to this area.

Transportation Master Plan Approach

INVENTORY OF EXISTING TRANSPORTATION FACILITIES

We will perform an inventory of current road infrastructure, including key intersections and major access points. This site visit will also involve discussions with town officials to pinpoint specific problem areas that need attention.

- **Mapping Existing Infrastructure:** We'll create a map of the town's transportation network. This GIS database will be available for future use by the town.

INCORPORATION AND REVIEW OF TRANSPORTATION ORDINANCES AND DESIGN STANDARDS

We will work with the town to incorporate transportation ordinances and design standards into the study. Our experience with similar communities facing comparable growth challenges will allow us to provide additional insights on successful strategies for community networks.

IDENTIFICATION OF PROBLEM AREAS AND SOLUTIONS

Use information from the town and look at proposed development and areas that have development potential to come up with a good, flowing transportation network.

Public Safety Master Plan

INVENTORY OF EXISTING FACILITIES AND RESOURCES

We will perform a comprehensive inventory of current public safety infrastructure and facilities, including fire stations, police stations, and emergency operations centers. This site visit will also include a discussion with the town to identify current problem areas that require specific attention and solutions. Inventorying existing facilities involves:

- **Understanding Existing Coverage and Capabilities:** We will collect and review data on the distribution of public safety facilities and resources, including personnel, vehicles, and equipment. We will evaluate how the existing infrastructure supports or impedes effective emergency response across the town.
- **Mapping Existing Infrastructure:** Following our site visit, we will finalize the mapping of public safety facilities, patrol zones, and fire districts with notes on their current conditions and capabilities. This GIS database and mapping will be available to you for future use following our completion of the study.

IDENTIFICATION OF GAPS AND SOLUTIONS

Work with local fire authorities to identify town needs. Look at the existing level of service and identify when additional services will need to be provided to handle the additional growth anticipated in the community.



Relevant Experience & Qualifications

Sunrise offers an exceptional set of credentials, which promise value to the Town of Apple Valley's capital facilities planning process. The qualifications and key issues presented below highlight Sunrise's capabilities and show that Sunrise is most qualified to deliver this planning effort:

- **Staff Availability:** Our team is fully staffed and available to begin work immediately. All key personnel are committed to meeting project milestones with urgency and accountability. We understand the importance of timely delivery and will maintain consistent, open communication with the town's staff to ensure the final product is delivered on schedule and aligned with the Town of Apple Valley's goals.
- **Familiarity:** Sunrise has completed several impact fee facility plans for the Town of Apple Valley. Sunrise has also assisted with plan review and construction of different projects throughout the town. Our experience with the Town of Apple Valley is invaluable and allows Sunrise to pick up where we left off with population projections, town coordination, processes, preferences, etc. ***Sunrise manages, maintains, and is the acting administrator for the Town of Apple Valley's GIS enterprise software.*** The town accesses that database regularly for ongoing operation and maintenance needs. We are familiar with the Apple Valley's personnel, utility systems, and management styles. More importantly, the Apple Valley is familiar with Sunrise's team and quality of services.
- **Impact Fee Expertise:** Sunrise is frequently contracted to prepare impact fee facilities plans and impact fee analyses for public safety departments, parks and recreation services, transportation facilities, stormwater systems, water systems, and other municipal facilities that are impact fee eligible. We are recognized as an expert

in impact fee planning with a thorough understanding of the Utah Administrative Code, Title 11, Chapter 36a (Utah's Impact Fees Act). We understand how to establish levels of service and analyze improvements necessary to support new growth. We also help clients comply with the notice requirements listed in the Impact Fees Act and provide the Impact Fee Certification and Lay Person Summary that the act requires as part of our services.

- **GIS Database Management & Analytics:** ***Sunrise manages the Town of Apple Valley's GIS database through ESRI's cloud environment, making the database accessible and useful for what it was intended-an asset management tool.*** Sunrise is the only engineering firm in Utah to hold certifications as an ArcGIS Online Specialist and a Local Government Specialist. We are also a Silver ESRI partner. Most importantly, ***Sunrise personnel are currently partnered with the Town of Apple Valley in developing and maintaining the town's GIS database and can readily offer services to enhance the GIS services.***
- **Customer Service & Reputation:** Sunrise has won eight consecutive national PSMJ Premier Client Satisfaction Awards. The award is based on third-party surveys completed by our existing clients who rate our service delivery to them. We are committed to providing this premier level of service to the Town of Apple Valley on this planning effort.

We look forward to working with the Town of Apple Valley on this important project. Please contact our proposed project manager, Nathan Wallentine, at 435.215.1955 with any questions.

Client References

References

Santa Clara City

Dustin Mouritsen
Public Works Director
dmouritsen@santaclarautah.gov
435.619.3924

Enoch City

Rob Dotson
City Manager
rob@enochcityut.gov
435.463.4065

LaVerkin City

Derek Imlay
Public Works Director
derek.imlay@laverkincity.org
435.635.2581

Availability

Our team is fully committed to completing all project tasks in accordance with the grant timelines. Each key team member has confirmed their availability to support the project schedule and ensure deliverables are met on time and within scope.

APPENDIX A | RESUMES

Nate Wallentine, PE

Project Manager/Parks & Recreation Impact Fee Expert | Availability 75%

EDUCATION

BS - Civil Engineering, Utah State University
MS - Civil & Environmental Engineering, Utah State University

YEARS IN PROFESSION

7; 7 with Sunrise

REGISTRATIONS

Professional Engineer
Utah #12338863



Nate has been involved in the review, planning, design, and construction of a wide range of municipal engineering projects, and has served in the role of contracted engineer for cities and districts. This work has provided him with a strong understanding of municipal operations and the technical challenges faced by local governments and improvement districts. His background also includes extensive work in the design and construction of community parks and recreation facilities, preparation of facility planning studies, and development of water improvement projects. Many of these efforts have involved securing and administering public funding as well as coordinating with state and federal agencies. Nate's ability to communicate clearly and work effectively with clients and stakeholders has been a key factor in the success of his projects.

MASTER PLANNING & STUDIES EXPERIENCE

- Apple Valley Master Planning and IFFP
- Apple Valley Big Plains Water and Sewer SSD IFFP/Water Master Plan
- Apple Valley Storm Water, Public Safety, Parks, Roads Master Planning and IFFP
- Alton Town Culinary Water Master Plan & IFFP
- Angell Springs Water Master Plan & IFFP
- Beaver Dam Village Special Service District Culinary Water Master Plan
- Big Plains Water SSD IFFP/Water Master Plan
- Cedar City Storm Water Master Plan
- Enoch Culinary Water Impact Fee Plan
- Enoch City Stormwater IFFP
- Enoch Stormwater IFFP and IFA Update
- Hildale Water Master Plan
- Hildale Culinary Water Master Plan Update & GIS
- Ivins City Parks & Trails Master Plan Update
- Kanarrville Town Culinary Water Master Plan, Impact Fee Facilities Plan and Impact Fee Analysis
- Kane County Trails Master Plan
- KCWCD Water Master Plan
- KCWCD Culinary Water Master Plan
- KCWCD Duck Creek Wastewater Impact Fee Facilities Plan & Impact Fee Analysis
- KCWCD Jackson Flat Recreation Concept Plan
- KCWCD Wastewater Impact Fee Facilities Plan & Impact Fee Analysis
- LaVerkin City Wanlass Park Concept Plan
- LaVerkin Storm Water & Irrigation System Master Plans, Impact Fee Facility Plans, & Impact Fee Analyses
- Nibley City Stormwater Master Plan
- Orderville Culinary Water Master Plan, Impact Fee Facilities Plan, & Impact Fee Analysis

- Paragonah Culinary Water CIP
- Paragonah Culinary Water Master Plan
- Santa Clara Culinary Water CIP
- Santa Clara City Culinary Water Impact Fee Facilities Plan & Impact Fee Analysis
- Santa Clara Culinary & Irrigation Master Plan, IFFP & IFA
- Santa Clara Parks & Trails Master Plan, IFFP, & IFA
- Santa Clara Storm Water Master Plan Update, IFFP & IFA
- Springdale Parks and Recreation Master Plan Update
- Springdale Storm Water Master Plan & Update
- Santa Clara Wastewater Impact Fee Facilities Plan
- Summit Culinary Water CIP
- Summit SSD Water Master Plan
- Toquerville Culinary Water Master Plan & IFFP
- Trout Canyon Water Improvements PER & EA
- Washington City Culinary Water Master Plan & Update
- Washington City Secondary Water Master Plan
- Washington City Water Modeling Review
- Washington City Public Safety IFFP/IFA Update
- Utah Youth Soccer Association Pinnacle Ridge Soccer Complex Concept Plan

DRAINAGE EXPERIENCE

- Cedar City I-15 Drainage Improvements
- Johnson Avenue Drainage Improvements Project
- Legacy Park Drainage Study
- LaVerkin Storm Water & Irrigation System
- Zion Dormitory Drainage Improvements

CULINARY WATER EXPERIENCE

- Apple Valley Pipeline
- Kolob Water System
- Moapa Valley Water District Gubler Drive Transmission Line
- Moapa Valley Water District Swapp Drive Transmission Line

Joe Phillips, PE

QA/QC/Impact Fees/Public Safety & Fire Impact Fee Expert | Availability 75%



EDUCATION

MS - Civil Engineering, Brigham Young University
BS - Civil Engineering, Brigham Young University

YEARS IN PROFESSION

24; 24 with Sunrise

REGISTRATIONS

Professional Engineer
Utah #4777017
Nevada #017304
Arizona #43311

State Water Right Surveyor
Nevada #1262

Joe has experience in the review, planning, design and construction of many municipal engineering projects. Much of his experience has come from serving as a contracted city or district engineer; this has given Joe considerable knowledge of the day-to-day operations and technical issues experienced by municipalities and improvement districts. Joe also has extensive real experience in planning, design, and construction of community parks and recreation facilities, in completing facility planning studies, and implementing water improvements projects. Many of his projects have required acquisition and management of public funding packages and coordination with federal and state governmental agencies. Joe's strong communication and interpersonal skills have enabled success with his projects.

STORM WATER EXPERIENCE

- Santa Clara City Stormwater Master Plan
- Enterprise City Storm Drain Master Planning
- Springdale Town Stormwater Master Plan
- LaVerkin City Stormwater Master Plan
- Coyote Springs LCCGID Stormwater CIP
- Leeds Town Stormwater Master Plan
- Caliente Flood Insurance Rate Map Analysis
- Caliente City Spring Heights Flood Control
- Lincoln County Stormwater CIPs
- Kanab City Tom's Canyon Flood Prevention
- Enoch City Stormwater IFFPA
- Apple Valley Town Master Planning and IFFP
- Springdale Town Stormwater Master Plan
- Enoch City East Bench Watershed Plan-EA
- Santa Clara City Stormwater MP Updates
- Cedar City Stormwater Master Plan
- Cedar City Emergency Storm Drain Project
- Cedar City I-15 Drainage Improvements
- LaVerkin SW & Irrigation System MP, IFFP, & IFA
- Enoch City Stormwater IFFP Update
- Cedar City On-Call Stormwater Modeling

GENERAL PLAN EXPERIENCE

- Salem City Area Plan and Economics Evaluation
- Apple Valley Town General Plan
- Leeds Town General Plan Update
- Orderville Town General Plan Update
- Big Water Town General Plan
- Toquerville General Plan Update

TRANSPORTATION EXPERIENCE

- Enoch City Transportation IFFP & IFA
- LaVerkin Transportation MP, IFFP, & IFA
- Orderville Transportation MP, IFFP, & IFA
- Toquerville City Transportation Master Plan

- Coyote Springs LCCGID Street Facilities CIP
- Caliente Transportation Facilities CIP
- Lincoln County RTC Capital Improvements Plan
- UDOT St. George Indian Hills Drive Design
- SUU Curb Crossing & ADA Walkway Improvements
- LaVerkin City 300 West Improvements
- UDOT SR-20; Roadside Improvements
- UDOT SR-143 & SR-274 Road Improvements
- Washington City Merrill Road Project
- LaVerkin Safe Route to Schools Project
- Ivins City Gap Fill Road Projects
- Washington City Main Street Project
- UDOT I-15 Exit 16 Interchange Phase I
- St. George 3000 East Design & Construction
- UDOT Washington Parkway Green Springs Dr
- LaVerkin Roads Improvements Project
- Washington City Fields Road
- UDOT I-15; Wilden Exit 10 to 13 & Exit 11
- Herriman 6400 W & 14200 S Roadway
- UDOT New Traffic Signal SR-108 @ 800 North
- Mohave Co. Emergency Service Park Place Road
- Orderville Town Center St. Bridge Replacement
- Jerry Maeder NDOT Encroachment Application
- LaVerkin City 100 East Road Project
- Caliente Highway 93 Pedestrian Route
- Lincoln County Travel Management Plan
- LaVerkin City Silver Acres Reconstruction Project
- Caliente City Clark Street Improvements
- Springdale Town Juniper Lane Improvements
- Big Water Town Road & Drainage Improvements
- SUU Curb Crossing Improvements
- Orderville Town Curb & Gutter Extension
- Hildale City Canyon & Willow St. Improvements
- SUU ADA Walkway Improvements Project
- Orderville Quarter Circle H Ranch Road Study
- SUU ADA Improvements

Christopher Daughton

GIS Specialist | Availability 50%



EDUCATION

BS - Engineering Technology, Southern Utah University
 AAS - Design Technology, Southern Utah University
 2-year Certificate, GIS, Southern Utah University
 1-year Certificate, Civil Design, Southern Utah University

YEARS IN PROFESSION

13; 10 with Sunrise

Chris has hands-on experience with a variety of GIS projects. He has had 12 years of GIS experience including nine years with Sunrise Engineering. He has expertise in providing mapping services and analysis through ArcGIS for Desktop software. Christopher also has experience in reading legal descriptions, editing PLSS data throughout the states of Arizona, California, Idaho, Nevada, Utah, and Wyoming. He has expertise in Auto CAD, ArcGIS Pro, and providing parcel fabric solutions in ArcGIS Pro, creating models in ArcMap and ArcGIS Pro, writing scripts in python and arcade, managing file geodatabases and enterprise geodatabases, SQL Server administration and SDE creation, communication skills, managing and working in a team environment, and finalizing project deliverables. Other areas of proficiency include ArcGIS Online for Organizations, Web AppBuilder for ArcGIS, ArcGIS for Server, Collector for ArcGIS, and Survey 123 for ArcGIS.

PARCEL MANAGEMENT

- Lincoln County, Nevada
- Iron County, Utah
- Juab County, Utah
- Rich County, Utah
- Kane County, Utah
- Enoch, Utah

CEMETERY MANAGEMENT

- Escalante City GIS Cemetery Services
- Eureka City GIS Cemetery Services
- Springdale GIS Services 2022
- Heber City, Utah
- Veterans Memorial Cemetery, Utah

ZONING AND LAND USE MANAGEMENT

- Apple Valley, Utah
- Fillmore, Utah
- Delta, Utah
- Enoch, Utah
- Big Water, Utah
- Colorado City, Arizona
- Lincoln County, Nevada
- Gunnison, Utah
- Hildale, Utah
- Santa Clara, Utah
- Afton, Wyoming

RESOURCE MANAGEMENT PLANS

- Alton Coal Mine, Utah
- Best Friends, Utah
- Trout Canyon, Nevada
- Arizona Strip, Arizona
- Tabiona, Utah
- Beaver, Utah
- Vernal, Utah

UTILITY SYSTEM MANAGEMENT

- Mt Pleasant, Utah
- Tropic, Utah
- Santa Clara, Utah
- Springdale, Utah
- Caliente, Nevada
- Kingman, Arizona
- Big Park, Arizona
- Pine Bluffs, Wyoming
- Ashley Valley, Utah
- Duck Creek, Utah
- Fillmore, Utah
- LaVerkin, Utah
- Nephi, Utah
- Gunnison, Utah
- Orderville, Utah
- Panguitch, Utah
- Parowan, Utah

TRANSPORTATION AND TRAILS MANAGEMENT

- Apple Valley, Utah
- Lincoln County, Nevada
- Iron County, Utah
- Pine Bluffs, Wyoming
- Enoch, Utah
- Heber, Utah
- Big Water, Utah
- Enoch, Utah
- Uintah County, Utah
- UDOT Region 4, Utah

Jeff Mortimer, PE

Transportation Impact Fee Expert | Availability 50%



EDUCATION

MS - Civil Engineering (Transportation), Ohio University
 BS - Civil Engineering, Brigham Young University Idaho

YEARS IN PROFESSION

8; 2 with Sunrise

REGISTRATIONS

Professional Engineer
 Utah #11631694
 Wyoming #19687
 Idaho #P-22518
 Alabama #PE52662

Jeff has eight years of civil engineering experience, mainly in traffic and transportation. He has been involved with various transportation planning and design projects throughout Utah, Idaho, and Washington. He has experience in transportation master planning, impact fee analysis, traffic impact studies, roadway design, and intersection design. He has a Bachelor’s Degree in Civil Engineering as well as a Master’s Degree in Civil Engineering with an emphasis in transportation. Jeff has experience in both the private and public sectors. Jeff strives for professionalism and quality in all projects he is involved with and prioritizes clear and concise communications. Jeff’s involvement will add to the overall success of the project.

TRANSPORTATION EXPERIENCE

- Zion Solar Transportation Plan
- Orderville Transportation Master Plan, Impact Fee Facilities Plan, & Impact Fee Analysis
- LaVerkin Transportation Master Plan, Impact Fee Facilities Plan, & Impact Fee Analysis
- Chubbuck Village Traffic Impact Study
- Alan & Lee - Lower Family Foods Traffic Impact Study
- Sara St/Spring Crrek Pkwy Stop Sign Warrant - Providence, UT
- Beaver County General Plan and Master Transportation Plan
- UDOT Traffic Impact Study Hwy 165 and 300 South in Providence
- Level 3 UDOT Traffic Impact Study US-91 - 1600 to 1800 North
- Enoch City Transportation Impact Fee Facility Plans and Analysis
- Hyde Park Transportation Plan
- Lincoln County Traffic Impact Study
- Santa Clara Miscellaneous On-Call Engineering Services
- Hemmert Ranch Master Plan Report
- Tropic Active Transportation Plan
- Tyson Carroll 2850 US Hwy Impact Study
- Crestwood Road Improvements

PREVIOUS EMPLOYER EXPERIENCE

- Orem City, UT – Transportation Master Plan
- Eagle Mountain, UT – Transportation Master Plan
- Saratoga Springs, UT – Transportation Master Plan
- American Fork City, UT – Transportation Master Plan
- Rexburg, ID – Transportation Master Plan
- Eagle Mountain, UT – Lone Tree Pkwy Signal Design
- Seattle, WA – Climate Pledge Arena Multi Modal Traffic Design
- Eagle Mountain, UT – Pony Express Improvements & Widening
- Duchesne County, UT – Duchesne County Water Conservancy District Water Resources Master Plan

Jon Hanson, PE

Geotechnical Expert | Availability 50%



EDUCATION

MS - Civil Engineering, Brigham Young University

BS - Civil Engineering, Brigham Young University

YEARS IN PROFESSION

19; 2 with Sunrise

Registrations

Professional Engineer:

Utah #7038303

Arizona #47882

Jon is a seasoned geotechnical professional with nearly 20 years of experience in the industry. He has overseen a variety of residential and commercial projects in his career. He maintains a strong focus on team success and support while managing project budgets and scopes, coordinating field operations, and providing analyses. His expertise spans foundations, slope stability, pavement design, and more, ensuring the successful completion of diverse projects. Jon is dedicated to delivering quality solutions and fostering professional growth.

STORM WATER EXPERIENCE

- Cedar City On-Call Storm Water Modeling Services
- Enoch City Stormwater IFFP 2023

TRANSPORTATION EXPERIENCE

- Springdale Canyon View & Watchman Roadway Replacement
- Lincoln County Airport Road Phase I
- Orderville Transportation Master Plan, Impact Fee Facilities Plan, & Impact Fee Analysis
- Red Hawk Dr. Pavement Distress Investigation
- St George 3000 East (SeegDr-2000S) Construction
- Toquerville Cholla Creek Turn Lanes CM
- Washington City Covington House Parking Lot
- Springdale Town Balanced Rock & Hummingbird Roads

WATER EXPERIENCE

- Apple Valley Pipeline
- Kane County Water Conservancy District - Water Reuse Feasibility Plan
- Alton Town Culinary Water Master Plan & IFFP 2024
- Beaver Dam Pressure Tank Improvements 2024
- Beaver Dam Village SSD Culinary Water Master Plan
- Kanarraville Town Culinary Water Master Plan, Impact Fee Facilities Plan and Impact Fee Analysis
- KCWCD Miscellaneous Engineering Services
- KCWCD New Paria Water Improvements
- LaVerkin Culinary Water Master Plan, IFFP, & IFA
- LaVerkin Lead Service Line Inventory & Replacement Plan
- Lincoln County Panaca East Water Expansion Plan
- Washington City Long Valley Tank & Pump Station
- MVWD 24-Inch Line Replacement (N. Henrie Road to Arrowhead Road)
- MVWD Main Street Water Line Improvements
- MVWD Main Street Water Line Improvements

- MVWD Narrows Tank and Arrow Canyon Well
- Orderville Culinary Water Master Plan, Impact Fee Facilities Plan, & Impact Fee Analysis
- Orderville Culinary Water Improvements 2024
- Paragonah Water Improvement Project 2023
- Parowan Airport Water Line Extension
- VVWD Hillside Dr and Canal St Pipeline
- VVWD NW Tank Well and Treatment

MUNICIPAL EXPERIENCE

- Atlanta Mine On-Call Engineering Services
- Costco - S. St George-UT New Warehouse & Fuel DD
- Heber City Coyote Springs Park
- Leeds Town Miscellaneous Engineering Services
- Design ROW and CE for Kanarraville RA Lagoon
- Santa Clara City Engineer
- St. George Curly Hollow Adventure Park
- Springdale - Redhawk Preliminary Design
- Springdale Miscellaneous Engineering Services
- St. George Sand Hollow Aquatic Center Vault Repairs
- St. George City - Tonaquint Cemetery Expansion
- Zion Corridor Trail 30% Design
- Zion National Park Sewer - Phase 1

WASTEWATER EXPERIENCE

- Industrial Park Wastewater Line 2024
- KCWCD Kanab & Duck Creek Wastewater Reuse Feasibility Study
- Springdale Wastewater Lagoon Improvement
- Washington City Fields Sewer Trunk Line 2021

Brad Robbins

Public Ordinance Expert | Availability 25%



EDUCATION

MS - Liberal Studies, University of Oklahoma
BS - Geography, University of California

YEARS IN PROFESSION

35; 3 with Sunrise

Brad brings over 30 years of leadership and management experience in local government, including seven years as a City Manager, and roles as Planning Director, Department of Water and Power General Manager, and Assistant City Manager. His experience includes overseeing a 40,000-connection municipal water district, where he was responsible for managing water system testing, including pressure and hydrostatic leak testing, pipe deflection testing, flushing, disinfection, and the installation of water mains, service lines, and related infrastructure.

In addition to his work on water systems, Brad managed sewer system testing, including backfill and compaction testing, mainline inspections, infiltration and deflection testing, and assessments of manholes and service connections. He ensured that all work met quality standards and that proper documentation was maintained throughout the process. His role required oversight of both water and sewer systems to make sure each phase of installation and testing was completed efficiently and in compliance with regulatory standards.

COMMUNITY PLANNING

- LaVerkin On-Call City Planner Services
- Apple Valley General Plan
- Big Water General Plan Update
- Fillmore City Planning Assistance
- Leeds Town General Plan Update
- Manila Planning & Zoning Ordinance Update
- Orderville Town Municipal Code & Design Standards Update
- Richfield City Planning
- Salem Area Plan & Economics Evaluation
- Salem City Planning Updates
- Toquerville General Plan Update

MUNICIPAL/DISTRICT & ON-CALL ENGINEERING

- Apple Valley Town General Engineering On-Call Services
- Big Water On-Call Engineering Services
- Colorado City On-Call Services
- Enterprise General Engineering Services
- Fillmore City General Engineering
- Hilldale City General Engineering Services
- LaVerkin City Engineering Services
- Leeds Town Engineering Services
- Santa Clara City Engineer
- Santa Clara On-Call Engineering
- Springdale Engineering Services
- Virgin Town On-Call Planning Services

PLANS & STUDIES

- Apple Valley Storm Water, Public Safety, Parks, Roads Master Planning and IFFP
- Enoch City East Bench Watershed Plan-EA
- Kanarrville Town Culinary Water Master Plan, Impact Fee Facilities Plan and Impact Fee Analysis
- Springdale Culinary Water Master Plan Update
- Toquerville General Plan Update
- Virgin Town Zoning Map Update

WATER

- CMSSD Page Sharmel Water Improvements Project
- LaVerkin Culinary Water Master Plan, IFFP, & IFA
- Oculita Roca Water Feasibility Agreement

TRANSPORTATION

- Lincoln County Airport Road Phase 1

LEAD AND COPPER RULE REVISIONS

- CDPHE LCRR Project Management
- DDW LCRR Initial Inventories
- WSP - Colorado Department Public Health and Environment LCRR 2023

Mike Wonenberg, PLA

Concept Planning | G. Brown Design, Inc. | Availability 50%

EDUCATION

BS - Landscape Architecture, University of Idaho

YEARS IN PROFESSION

25

LICENSURE

Licensed Landscape Architect, Utah



Mike is a Licensed Landscape Architect with experience planning and designing streetscapes and urban spaces. Mike has been project manager for 6 of the firm's award-winning projects.

Mike has a passion for designing unique exterior spaces that maximize a site's potential to become an asset to the surrounding community. Mike brings to the table a diverse background of project experience working on a variety of projects. This distinctive blend of creating memorable exterior spaces that are efficient and maintainable strikes a balance between form and function.

He has proven strength in conceptual design, site design, visual simulation analysis, construction documentation, project coordination, and construction administration which ensures a project vision is carried from initial concept to a built reality.

EXPERIENCE

- Overton Main Street, Overton, NV
- Hatch Park Streetscape (as part of overall Park Master Plan)
- UTA North Park-N-Ride, South Jordan, UT
- SR-68 -I215 Interchange Landscape, North Salt Lake, UT
- 104th South Parkway, South Jordan, UT
- Daybreak Parkway, South Jordan, UT
- 114th South Parkway, South Jordan, UT
- Daybreak Community Street Tree Master Plan, South Jordan, UT
- 118th South Park Strips, South Jordan, UT
- 102nd South Park Strips, South Jordan, UT
- Utah State University Quad Tree Replacement Master Plan, Logan, UT
- Jackson Hole Airport, Entry Improvements and round-about, WY
- SpringHouse Village Street Tree Plan, South Jordan, UT
- Logan City Entry Feature, Logan Utah
- Daybreak 104th South Entry Monument, South Jordan, UT
- Herriman City Park Strips, Herriman, UT
- SoDa Row Village City Center, South Jordan, UT (LEED)
- Orchard Drive Bike Lane and Streetscape Improvement Exhibits, North Salt Lake, UT
- World Trade Center Plaza Concepts, Salt Lake City, UT
- East Lake Promenade, South Jordan, UT
- Shakespeare Theatre & Southern Museum of Art (SUMA), Southern Utah University, Cedar City, UT
- Park City Film Studio, Park City, UT
- SLCo Parks & Public Works Operations Center, West Jordan, UT
- SLCo Fleet Management & Heavy Duty Shop Building, Midvale, UT
- Salt Lake City Fire Station #14, Salt Lake City, UT (LEED/ Net Zero)
- Salt Lake City Fire Station #3, Salt Lake City, UT (LEED/ Net Zero)
- Sandy City Parks Maintenance Yard Improvements, Sandy, UT
- Highland City Maintenance Yard, Highland, City, UT
- Cache County Operation Center, Hyrum, UT

**Town of Apple Valley
Disbursement Listing
SBSU Operating - 08/01/2025 to 08/31/2025**

Payee Name	Reference Number	Payment Date	Payment Amount	Void Date	Void Amount	Source
Google LLC	G08012025	08/01/2025	\$369.60			Purchasing
Utah Retirement Systems	URS08012025	08/01/2025	\$2,170.98			Payroll
Snow Caldwell Beckstrom& Wilbanks, P	6257	08/04/2025	\$50,000.00			Purchasing
Superior Technical Solutions LLC	STS08042025	08/04/2025	\$684.50			Purchasing
Wells, Kaden	6259	08/05/2025	\$1,340.00			Purchasing
Catherine Wall	6260	08/05/2025	\$140.00			Purchasing
CRM and Sons, Inc.	6261	08/05/2025	\$509.00			Purchasing
James R Weeks	6262	08/05/2025	\$375.00			Purchasing
Original Dirt Company	6263	08/05/2025	\$348.80			Purchasing
Revco Leasing	6264	08/05/2025	\$302.51			Purchasing
South Central Communications	6265	08/05/2025	\$971.31			Purchasing
Pauken, Darcy Anne	6266	08/05/2025	\$1,600.00			Purchasing
UpAhead LLC	6267	08/05/2025	\$2,388.00			Purchasing
JP Cooke Co.	6268	08/05/2025	\$74.75			Purchasing
Chase Paymentech	C08052025	08/05/2025	\$0.44			Purchasing
Chase Paymentech	C852025	08/05/2025	\$431.42			Purchasing
Shums Coda	6270	08/07/2025	\$8,090.00			Purchasing
Town of Apple Valley	6271	08/07/2025	\$2,714.03			Purchasing
Amazon Capital Services	6272	08/07/2025	\$217.36			Purchasing
Sunrise Engineering Inc.	6273	08/07/2025	\$2,960.00			Purchasing
Tink's Napa Superior Auto Parts	6274	08/07/2025	\$51.99			Purchasing
LN Curtis and sons	6275	08/07/2025	\$362.37			Purchasing
Dr. Wilson, Michael	6276	08/07/2025	\$1,200.00			Purchasing
XPress Bill Pay	XBP08072025	08/07/2025	\$407.85			Purchasing
Payroll	0808251200	08/08/2025	\$9,789.76			Paycheck
Internal Revenue Service	EFTPS0808202	08/08/2025	\$2,328.65			Payroll
Payroll	0809251200	08/09/2025	\$421.12			Paycheck
HMH Fencing LLC	6277	08/11/2025	\$4,273.36			Purchasing
Utah Retirement Systems	URS8112025	08/11/2025	\$1,993.73			Payroll
Scholzen Products	6278	08/12/2025	\$8,781.94			Purchasing
Catherine Wall	6279	08/12/2025	\$140.00			Purchasing
Farrar, CPA	6280	08/12/2025	\$1,387.50			Purchasing
Southwest Utah Public Health Dept.	6281	08/12/2025	\$75.00			Purchasing
Washington County Sheriff's Office	6282	08/12/2025	\$3,750.00			Purchasing
Internal Revenue Service	EFTPS0811202	08/12/2025	\$69.76			Payroll
Cottam Law LLC	6283	08/13/2025	\$940.00			Purchasing
Rocky Mountain Power	RMP08152025	08/15/2025	\$507.15			Purchasing
USPS	USPS8152025	08/15/2025	\$312.00			Purchasing
Catherine Wall	6284	08/18/2025	\$140.00			Purchasing
H&K Hoole & King L.C. Law Offices	6285	08/18/2025	\$14,990.55			Purchasing
Zoom Video Communications Inc.	Z08182025	08/18/2025	\$15.99			Purchasing
St.George Turf	6286	08/19/2025	\$811.40			Purchasing
Little Creek Station	6287	08/19/2025	\$19.93			Purchasing
Jenkins Oil Company Inc.	6288	08/19/2025	\$1,081.97			Purchasing
Interstate Rock Products Inc.	6289	08/19/2025	\$186.08			Purchasing
Scholzen Products	6290	08/19/2025	\$524.61			Purchasing
State Bank of Southern Utah	SBSU08192025	08/19/2025	\$15.00			Purchasing
Ground Level Enterprises	6293	08/21/2025	\$769.20			Purchasing
Spencer, Christine Stacy	6294	08/21/2025	\$603.52			Purchasing
Harris and Ayala, Jeff and Jessica	6295	08/21/2025	\$1,266.50			Purchasing
Payroll	0822251200	08/22/2025	\$11,740.68			Paycheck
Internal Revenue Service	EFTPS8222025	08/22/2025	\$2,946.66			Payroll
Utah Retirement Systems	URS8222025	08/22/2025	\$2,387.21			Payroll
Catherine Wall	6296	08/25/2025	\$140.00			Purchasing
Knudson, Thomas C	6297	08/26/2025	\$273.50			Purchasing
Shums Coda	6298	08/26/2025	\$5,535.00			Purchasing
Habitat for Humanity	HH8272025	08/27/2025	\$25.60			Purchasing
Amazon.com	A8282025	08/28/2025	\$57.00			Purchasing
Basic American Supply	BAS08292025	08/29/2025	\$21.98			Purchasing
Tractor Supply	TS08292025	08/29/2025	\$1,095.95			Purchasing
			\$157,128.21		\$0.00	

**Town of Apple Valley
Disbursement Listing
SBSU Fire - 08/01/2025 to 08/31/2025**

Payee Name	Reference Number	Payment Date	Payment Amount	Void Date	Void Amount	Source
Rubberstamps.com	RS852025	08/05/2025	\$25.14			Purchasing
MES Service Company	MES08122025	08/12/2025	\$224.68			Purchasing
Western Safety Products	WSP07122025	08/12/2025	\$88.72			Purchasing
Fire Smarts LLC	FS08142025	08/14/2025	\$47.00			Purchasing
Speidel.com	S082022025	08/20/2025	\$77.88			Purchasing
O'Reilly Auto Parts	OR8212025	08/21/2025	\$38.42			Purchasing
Auto Zone	AZ8262025	08/26/2025	\$30.91			Purchasing
IMS Alliance	IMS8262025	08/26/2025	\$418.99			Purchasing
			\$951.74		\$0.00	

**Town of Apple Valley
Disbursement Listing
SBSU Operating - Big Plains - 08/01/2025 to 08/31/2025**

Payee Name	Reference Number	Payment Date	Payment Amount	Void Date	Void Amount	Source
Utah Retirement Systems	URS08012025	08/01/2025	\$331.00			Purchasing
Steamroller Copies Inc.	1715	08/07/2025	\$78.33			Purchasing
Scholzen Products	1716	08/07/2025	\$1,729.71			Purchasing
Big Plains - Direct Deposit	0808251200	08/08/2025	\$2,207.68			JE: 849
Internal Revenue Service	EFTPS0808202	08/08/2025	\$609.96			Purchasing
Ruesch & Reeve, PLLC	1717	08/11/2025	\$1,325.00			Purchasing
Chemtech-Ford LLC	1718	08/11/2025	\$455.00			Purchasing
Remedy Excavating LLC	1719	08/11/2025	\$9,280.00			Purchasing
AT&T and Affiliates	ATT8112025	08/11/2025	\$58.75			Purchasing
State Bank of Southern Utah	SBSU8122025	08/12/2025	\$333.08			Purchasing
Utah Retirement Systems	URS8122025	08/12/2025	\$375.00			Purchasing
Rocky Mountain Power	RMP08152025	08/15/2025	\$4,617.87			Purchasing
USDA Rural Development	SBSU08152025	08/15/2025	\$1,269.00			Purchasing
USDA Rural Development	SBUS8152025	08/15/2025	\$9,271.00			Purchasing
			\$31,941.38		\$0.00	

Town of Apple Valley
Operational Budget Report
10 General Fund - 07/01/2025 to 08/31/2025
16.67% of the fiscal year has expired

Item 6.

	Prior YTD	Current Period	Current YTD	Annual Budget	Percent Used
Change In Net Position					
Revenue:					
Taxes					
3110 General Property Taxes-Current	5,246.59	1,619.58	2,781.04	195,000.00	1.43%
3130 General Sales and Use Taxes	35,928.10	19,911.05	36,059.63	204,325.00	17.65%
3140 Energy and Communication Taxes	9,399.56	5,780.27	10,324.41	45,000.00	22.94%
3150 RAP Tax	2,013.27	1,716.83	3,372.83	18,000.00	18.74%
3160 Transient Taxes	5,387.10	1,426.93	3,975.95	18,000.00	22.09%
3180 Fuel Tax Refund	0.00	0.00	451.24	0.00	0.00%
3190 Highway/Transit Tax	3,490.00	1,858.31	3,482.23	17,100.00	20.36%
Total Taxes	61,464.62	32,312.97	60,447.33	497,425.00	12.15%
Licenses and permits					
3210 Business Licenses	750.00	0.00	0.00	10,500.00	0.00%
3221 Building Permits-Fee	1,402.51	5,035.43	10,561.99	45,000.00	23.47%
3222 Building Permits-Non Surcharge	319.38	698.77	4,311.03	7,750.00	55.63%
3224 Building Permits Surcharge	1.54	6.43	14.16	100.00	14.16%
3225 Animal Licenses	0.00	30.00	40.00	500.00	8.00%
Total Licenses and permits	2,473.43	5,770.63	14,927.18	63,850.00	23.38%
Intergovernmental revenue					
3356 Class "C" Road Allotment	21,185.32	0.00	0.00	112,000.00	0.00%
3358 Liquor Control Profits	0.00	0.00	0.00	1,100.00	0.00%
Total Intergovernmental revenue	21,185.32	0.00	0.00	113,100.00	0.00%
Charges for services					
3230 Special Event Permit	0.00	4,050.00	4,050.00	1,000.00	405.00%
3410 Clerical Services	0.00	341.12	341.12	400.00	85.28%
3416 Other Interdepartmental Charges	5,000.00	0.00	3,000.00	36,000.00	8.33%
3431 Zoning and Subdivision Fees	2,400.00	13,409.60	33,144.20	20,000.00	165.72%
3440 Solid Waste	10,574.10	5,691.40	11,313.25	51,000.00	22.18%
3440.5 Paperless Bill Credit	0.00	(439.50)	(871.50)	(3,000.00)	29.05%
3441 Storm Drainage	8,425.32	4,370.48	8,717.16	49,000.00	17.79%
3461 GRAMA Requests	0.00	0.00	0.00	100.00	0.00%
3470 Park and Recreation Fees	0.00	0.00	225.00	100.00	225.00%
3615 Late Charges/Other Fees	519.47	191.70	207.95	1,000.00	20.80%
Total Charges for services	26,918.89	27,614.80	60,127.18	155,600.00	38.64%
Fines and forfeitures					
3510 Fines	1,288.23	0.00	864.78	5,000.00	17.30%
Total Fines and forfeitures	1,288.23	0.00	864.78	5,000.00	17.30%
Interest					
3610 Interest Earnings	10,871.32	4,976.89	10,085.33	45,000.00	22.41%
Total Interest	10,871.32	4,976.89	10,085.33	45,000.00	22.41%
Miscellaneous revenue					
3640 Sale of Capital Assets	0.00	0.00	0.00	20,000.00	0.00%
3690 Sundry Revenue	(133.89)	0.00	215.93	5,000.00	4.32%
3801.1 Impact fees - Fire	0.00	844.00	2,532.00	6,800.00	37.24%
3801.3 Impact fees - Roadways	0.00	2,660.00	7,980.00	24,600.00	32.44%
3801.6 Impact fees - Storm Water	0.00	2,770.36	6,983.62	31,000.00	22.53%
3801.7 Impact fees - Parks, Trails, OS	0.00	725.00	2,175.00	6,600.00	32.95%
Total Miscellaneous revenue	(133.89)	6,999.36	19,886.55	94,000.00	21.16%
Total Revenue:	124,067.92	77,674.65	166,338.35	973,975.00	17.08%
Expenditures:					
General government					
Council					
4111.110 Council/PC Salaries and Wages	1,854.99	287.50	612.50	13,000.00	4.71%
4111.130 Council/PC Employee benefits	141.55	37.89	74.37	1,000.00	7.44%
4111.610 Council Donations and Discretionary Spending	0.00	19.93	19.93	5,000.00	0.40%
Total Council	1,996.54	345.32	706.80	19,000.00	3.72%
Administrative					
4141.110 Admin Salaries and Wages	22,022.83	11,057.32	21,916.38	161,600.00	13.56%
4141.130 Admin Employee Benefits	3,212.03	2,606.34	4,655.06	20,000.00	23.28%
4141.140 Admin Employee Retirement - GASB 68	2,315.25	1,024.60	2,022.94	11,000.00	18.39%
4141.210 Admin Dues, Subs & Memberships	3,573.48	0.00	3,340.38	11,000.00	30.37%
4141.220 Admin Public Notices	0.00	0.00	0.00	100.00	0.00%

Town of Apple Valley
Operational Budget Report
10 General Fund - 07/01/2025 to 08/31/2025
16.67% of the fiscal year has expired

Item 6.

	Prior YTD	Current Period	Current YTD	Annual Budget	Percent Used
4141.230 Admin Training	325.00	0.00	0.00	1,000.00	0.00%
4141.240 Admin Office/Administrative Expense	1,781.88	274.02	2,826.95	15,000.00	18.85%
4141.250 Admin Equipment Expenses	3,019.91	1,149.16	2,298.32	13,000.00	17.68%
4141.260 Admin Building & Ground Maintenance	662.95	418.36	2,867.44	4,500.00	63.72%
4141.270 Admin Utilities	4,349.38	2,714.03	5,520.56	18,000.00	30.67%
4141.280 Admin Telephone and Internet	901.27	971.31	971.31	5,000.00	19.43%
4141.290 Admin Postage	292.00	312.00	677.00	3,700.00	18.30%
4141.320 Admin Engineering Fees	(81.00)	0.00	0.00	1,000.00	0.00%
4141.330 Admin Legal Fees	11,560.00	66,305.55	66,818.05	40,000.00	167.05%
4141.340 Admin Accounting & Auditing	2,812.50	1,387.50	2,587.50	40,000.00	6.47%
4141.350 Admin Building/Zoning/Planning Fees	8,563.75	5,535.00	13,625.00	27,000.00	50.46%
4141.390 Admin Bank Service Charges	15.00	15.00	15.00	200.00	7.50%
4141.410 Admin Insurance	14,772.81	0.00	16,925.68	16,000.00	105.79%
4141.490 Admin Travel Reimbursements	180.76	60.83	146.93	2,000.00	7.35%
4141.500 Admin Weed Abatement	0.00	0.00	175.00	0.00	0.00%
4141.610 Bad Debt Expense	(20.00)	0.00	0.00	0.00	0.00%
4170 Elections	0.00	0.00	0.00	1,500.00	0.00%
Total Administrative	80,259.80	93,831.02	147,389.50	391,600.00	37.64%
Total General government	82,256.34	94,176.34	148,096.30	410,600.00	36.07%
Public safety					
Police					
4210.110 Police Salaries & Wages/Contract	0.00	3,750.00	3,750.00	30,000.00	12.50%
4253.250 Animal Control Supplies	0.00	0.00	0.00	100.00	0.00%
Total Police	0.00	3,750.00	3,750.00	30,100.00	12.46%
Fire					
4220.110 Fire Salaries & Wages	12,140.00	7,354.11	13,531.85	94,000.00	14.40%
4220.130 Fire Employee Benefits	928.70	562.56	2,019.45	6,000.00	33.66%
4220.135 Fire Employee Retirement - GASB 68	2,015.51	1,302.21	2,170.35	9,100.00	23.85%
4220.150 Fire Contract Expense	1,164.00	1,200.00	3,528.00	4,000.00	88.20%
4220.210 Fire Dues, Subscriptions & Memberships	285.00	0.00	150.00	1,800.00	8.33%
4220.230 Fire Travel, Mileage & Cell	50.00	50.00	100.00	600.00	16.67%
4220.240 Fire Office & Other Expenses	225.99	25.14	156.13	2,000.00	7.81%
4220.250 Fire Equipment Maintenance & Repairs	2,282.17	1,018.69	1,946.41	8,000.00	24.33%
4220.260 Fire Rent Expense	0.00	0.00	3,000.00	6,000.00	50.00%
4220.360 Fire Training	266.12	47.00	540.00	2,100.00	25.71%
4220.450 Fire Small Equip/Supplies	2,966.42	77.88	5,702.52	15,000.00	38.02%
4220.455 EMS Medical Supplies	641.07	0.00	0.00	3,000.00	0.00%
4220.460 Fire Supplies-Fundraisers	0.00	0.00	0.00	500.00	0.00%
4220.465 Fire Gear	0.00	418.99	8,523.77	10,000.00	85.24%
4220.480 Fire Mitigation MOU Expenditures	0.00	0.00	0.00	15,000.00	0.00%
4220.560 Fire Equipment Fuel	873.22	419.72	451.38	2,500.00	18.06%
4220.740 Fire Capital Outlay	0.00	0.00	0.00	40,000.00	0.00%
Total Fire	23,838.20	12,476.30	41,819.86	219,600.00	19.04%
Total Public safety	23,838.20	16,226.30	45,569.86	249,700.00	18.25%
Highways and public improvements					
Highways					
4410.110 Road Wages and Contract Labor	907.00	422.50	422.50	3,000.00	14.08%
4410.130 Road Employee Benefits	69.40	32.20	32.20	200.00	16.10%
4410.275 Road Improvements	850.00	0.00	0.00	0.00	0.00%
4410.450 Road Department Supplies	0.00	186.08	186.08	1,000.00	18.61%
4410.810 Road Principal	0.00	0.00	0.00	36,000.00	0.00%
4410.820 Road Interest	0.00	0.00	0.00	27,275.00	0.00%
4415.110 Public Works Wages and Contract Labor	11,080.00	7,157.50	14,946.50	105,000.00	14.23%
4415.130 Public Works Employee Benefits	847.62	924.44	1,769.69	15,000.00	11.80%
4415.140 Public Works Employee Retirement - GASB 68	0.00	1,100.61	2,345.97	9,500.00	24.69%
4415.450 Public Works Supplies	1,342.47	0.00	103.33	6,000.00	1.72%
4415.550 Public Works Equipment Maintenance	3,328.34	1,430.48	1,724.34	3,000.00	57.48%
4415.560 Public Works Equipment Fuel	1,066.96	298.39	298.39	2,000.00	14.92%
4415.570 Public Works Travel, Mileage, Cell	0.00	0.00	0.00	500.00	0.00%
4415.615 Storm Drainage Improvements	1,996.80	0.00	0.00	0.00	0.00%
4415.740 Public Works Capital Outlay	13,000.00	0.00	0.00	0.00	0.00%
Total Highways	34,488.59	11,552.20	21,829.00	208,475.00	10.47%
Sanitation					
4420.460 Solid Waste Service	11,337.70	0.00	5,661.60	51,000.00	11.10%

Town of Apple Valley
Operational Budget Report
10 General Fund - 07/01/2025 to 08/31/2025
16.67% of the fiscal year has expired

Item 6.

	<u>Prior YTD</u>	<u>Current Period</u>	<u>Current YTD</u>	<u>Annual Budget</u>	<u>Percent Used</u>
Total Sanitation	11,337.70	0.00	5,661.60	51,000.00	11.10%
Total Highways and public improvements	45,826.29	11,552.20	27,490.60	259,475.00	10.59%
Parks, recreation, and public property					
Parks					
4540.110 Park/Rec Wages and Contract Labor	1,012.00	87.50	179.50	2,000.00	8.98%
4540.130 Park/Rec Employee Benefits	77.42	6.64	13.62	200.00	6.81%
4540.250 Park/Rec Department Expenses	309.07	0.00	0.00	1,000.00	0.00%
4540.460 Park/Rec Community Events Supplies	(27.86)	0.00	0.00	4,000.00	0.00%
Total Parks	1,370.63	94.14	193.12	7,200.00	2.68%
Total Parks, recreation, and public property	1,370.63	94.14	193.12	7,200.00	2.68%
Transfers					
4804 Transfer to Fund Balance	0.00	0.00	0.00	20,000.00	0.00%
4807 Transfer to Assigned Balance - Fire Impact Fees	0.00	0.00	0.00	(35,200.00)	0.00%
4809 Transfer to Assigned Balance - Roadway Impact Fee	0.00	0.00	0.00	24,600.00	0.00%
4810 Transfer to Assigned Balance -Storm Water Imp Fee	0.00	0.00	0.00	31,000.00	0.00%
4811 Transfer to Assigned Balance - Parks & Rec Fees	0.00	0.00	0.00	6,600.00	0.00%
Total Transfers	0.00	0.00	0.00	47,000.00	0.00%
Total Expenditures:	153,291.46	122,048.98	221,349.88	973,975.00	22.73%
Total Change In Net Position	(29,223.54)	(44,374.33)	(55,011.53)	0.00	0.00%

Town of Apple Valley
Operational Budget Report
51 Water Operations Fund - 07/01/2025 to 08/31/2025
16.67% of the fiscal year has expired

Item 6.

	Prior YTD	Current Period	Current YTD	Annual Budget	Percent Used
Income or Expense					
Income from Operations:					
Operating income					
5140 Water sales	170,352.06	48,614.38	48,614.38	670,000.00	7.26%
5150 Water standby fees	8,172.58	3,544.94	3,544.94	32,000.00	11.08%
5310 Connection fees	0.00	50.00	109,187.77	6,700.00	1,629.67%
5410 Late penalties and fees	732.25	0.00	0.00	3,000.00	0.00%
5490 Other operating income	(1,300.92)	0.00	0.00	2,250.00	0.00%
Total Operating income	177,955.97	52,209.32	161,347.09	713,950.00	22.60%
Operating expense					
6010 Clerical Contractor labor	0.00	0.00	0.00	300.00	0.00%
6011 Town Payroll Services	5,000.00	0.00	3,000.00	36,000.00	8.33%
6013 Water Salaries and Wages	11,538.50	16,593.17	21,593.17	95,000.00	22.73%
6014 Water Benefits	2,264.79	2,618.21	3,486.24	25,000.00	13.94%
6014.5 Water Employee Retirement - GASB 68	0.00	1,790.76	1,790.76	0.00	0.00%
6023 Travel	0.00	0.00	0.00	500.00	0.00%
6024 Training	0.00	0.00	0.00	1,200.00	0.00%
6025 Books/Subscriptions/Memberships	530.20	0.00	310.00	4,000.00	7.75%
6030 Office supplies and expenses	414.95	244.38	341.32	3,000.00	11.38%
6032 Postage	0.00	0.00	0.00	200.00	0.00%
6035 Bank service charges	(8.00)	0.00	0.00	100.00	0.00%
6040 Professional service	1,272.60	0.00	9,713.75	15,000.00	64.76%
6043 Accounting & Audit fees	0.00	5.24	5.24	10,000.00	0.05%
6044 Water test	1,387.48	530.00	730.00	5,000.00	14.60%
6045 Legal fees	850.00	0.00	0.00	20,000.00	0.00%
6050 Water System maintenance and repairs	773.55	7,235.00	18,216.76	15,000.00	121.45%
6051 Water System equipment	369.99	0.00	3,085.44	12,000.00	25.71%
6052 Well maintenance and repairs	115.20	0.00	389.60	20,000.00	1.95%
6053 Tank maintenance and repairs	333.42	0.00	0.00	11,000.00	0.00%
6060 Water Equipment Costs Other than Fuel	2,947.68	3,746.84	3,881.84	1,000.00	388.18%
6061 Water Equipment Fuel	422.83	332.20	332.20	6,000.00	5.54%
6067 Utilities	5,457.66	0.00	8,060.69	20,000.00	40.30%
6068 Telephone & Internet	0.00	58.75	117.50	0.00	0.00%
6070 Water Dept Insurance	0.00	0.00	8,271.42	12,000.00	68.93%
6095 Depreciation expense	25,960.81	13,204.08	26,408.16	165,000.00	16.00%
Total Operating expense	59,631.66	46,358.63	109,734.09	477,300.00	22.99%
Total Income from Operations:	118,324.31	5,850.69	51,613.00	236,650.00	21.81%
Non-Operating Items:					
Non-operating income					
5520 Impact fees	0.00	0.00	0.00	90,000.00	0.00%
5610 Interest income	2,257.84	1,501.14	2,938.48	12,000.00	24.49%
5690 Sundry Revenue	0.00	0.00	0.00	500.00	0.00%
Total Non-operating income	2,257.84	1,501.14	2,938.48	102,500.00	2.87%
Non-operating expense					
6080 Interest expense	13,860.77	6,794.51	13,600.07	83,110.00	16.36%
Total Non-operating expense	13,860.77	6,794.51	13,600.07	83,110.00	16.36%
Total Non-Operating Items:	(11,602.93)	(5,293.37)	(10,661.59)	19,390.00	-54.98%
Total Income or Expense	106,721.38	557.32	40,951.41	256,040.00	15.99%

Town of Apple Valley**WATER USAGE ANALYSIS**

	COMPARABLE ACCTS			TOTAL SYSTEM		
	2024/2025	2023/2024	Over/ (Under)	2024/2025	2023/2024	Over/ (Under)
JUL 2024	5,636,140	4,175,649	1,460,491	8,878,424	5,479,963	3,398,461
AUG	5,668,974	5,186,555	482,419	6,948,130	6,109,615	838,515
SEP	5,312,309	3,383,692	1,928,617	6,979,299	3,797,812	3,181,487
OCT	4,579,587	4,317,647	261,940	5,271,210	4,543,937	727,273
NOV	2,732,446	3,051,942	(319,496)	3,062,903	3,157,262	(94,359)
DEC	2,557,924	2,496,641	61,283	2,785,854	2,524,351	261,503
JAN 2025	2,021,606	1,929,335	92,271	2,958,671	2,217,125	741,546
FEB	2,135,835	1,628,010	507,825	2,668,605	1,648,950	1,019,655
MAR	2,259,604	2,204,640	54,964	3,479,383	2,530,120	949,263
APR	4,352,473	3,847,822	504,651	4,705,353	4,124,592	580,761
MAY	6,299,814	6,147,165	152,649	6,819,479	6,512,172	307,307
JUNE	7,325,980	6,882,997	442,983	7,670,940	7,313,637	357,303
FY2025 SUBTOTALS	50,882,692	45,252,095	5,630,597	62,228,251	49,959,536	12,268,715
	2025/2026	2024/2025	Over/ (Under)	2025/2026	2024/2025	Over/ (Under)
JUL 2025	9,396,900	8,198,934	1,197,966	10,378,670	8,652,204	1,726,466
AUG	6,847,030	6,257,214	589,816	7,169,566	6,800,544	369,022
SEP			0			0
OCT			0			0
NOV			0			0
DEC			0			0
JAN 2026			0			0
FEB			0			0
MAR			0			0
APR			0			0
May			0			0
JUNE			0			0
FY2026 SUBTOTALS	16,243,930	14,456,148	1,787,782	17,548,236	15,452,748	2,095,488

Comparable Accounts: Had usage in both years

Total System: All usage



TOWN COUNCIL HEARING AND MEETING

1777 N Meadowlark Dr, Apple Valley
Wednesday, August 20, 2025 at 6:00 PM

MINUTES

CALL TO ORDER - Mayor Farrar called the meeting to order at 6:00 PM

PLEDGE OF ALLEGIANCE

PRAYER - Prayer was offered by Council Member Sair

ROLL CALL

PRESENT

Mayor Michael Farrar

Council Member Kevin Sair

Council Member Scott Taylor

Council Member Richard Palmer

ABSENT

Council Member Annie Spendlove

DECLARATION OF CONFLICTS OF INTEREST

None declared.

MAYOR'S TOWN UPDATE

REPORTS, RECOMMENDATIONS, AND ANNOUNCEMENTS

Mayor Farrar reported that bar ditches remained the responsibility of property owners under existing town ordinance. He stated that public works employees Kevin Sair and Richard Palmer had been assisting with clearing ditches as the town had limited staff and funding. The mayor noted his intent to seek a future ordinance change so the town would assume responsibility for bar ditch maintenance, but until then, residents were still expected to maintain the ditches in front of their properties. He emphasized the importance of keeping culverts clear to prevent flooding and road damage.

Council Member Sair acknowledged the significant workload involved and commended the ongoing efforts.

The mayor then provided an update on the design of the million-gallon water tank project. He explained that the town had begun design work after confirming funding commitments from a subdivision developer. He anticipated grading work within a few months, with the goal of completing the project by the following year.

The mayor also discussed negotiations with Colorado City Police Department to provide contracted police services for Apple Valley. He stated that the agreement would include a dedicated officer patrolling Apple Valley around the clock, shared use of Hildale's court system, and integration into a unified dispatch system to improve emergency response times. The mayor clarified that while the long-term goal was to establish a local police department, the town did not yet have the resources to do so.

Council Member Taylor reminded residents that September would be National Preparedness Month and encouraged preparedness for families and pets.

A concern was then raised regarding bee activity near water trucks by Council Member Palmer. The mayor reported that he had met with the county bee inspector and the property owner, who had approximately 120 active hives. The inspector determined that the bees' defensiveness was temporary due to hive maintenance activities and that the owner was complying with state law. The mayor required the owner to provide a water source for the bees by the end of the week to meet local ordinance requirements.

Council Member Sair highlighted the importance of bees for pollination and expressed support for balancing community concerns with the species' ecological value. The mayor concluded that the ordinance had been developed with community input and that enforcement would continue to ensure compliance.

PUBLIC COMMENTS: 3 MINUTES EACH - DISCRETION OF MAYOR FARRAR

Resident Rich Ososki expressed appreciation to Council Member Sair and the town for assistance with a dirt delivery that helped prevent flooding near his property and a neighboring residence. He noted that while his own rock wall had been installed professionally and set back appropriately, some residents had placed walls, landscaping, or structures within easements and ditches, creating maintenance challenges. He asked for clarification on whether such installations were allowed under town code.

Ososki also raised concern about animals being kept in front yards. He explained that although the animals had been moved previously, they appeared to be returning, possibly hidden behind trees, and he questioned whether this would still be considered a violation of town ordinances.

Finally, he inquired about retail business license fees, noting that Class B and Class C fees had been reduced. He asked whether these adjustments had been recently approved and raised a question about licensing for microbreweries.

Council Member Sair clarified that renewal fees were typically lower than initial license fees. Mayor Farrar confirmed that no license fee changes were on the agenda that night, explaining that the current item only involved adding water fees into the fee schedule. The mayor also responded to Ososki's concerns by stating that rock walls within easements were not permitted, but enforcement would depend on whether problems occurred during upcoming monsoon storms. If issues arose, violation notices would be issued. On the matter of animals in front yards, the mayor explained that code enforcement would issue violations if animals were visible from the road but that he would not enter private property to inspect. Regarding business licenses, he reiterated that no recent changes had been made and that the differences Ososki observed reflected the standard distinction between initial and renewal fees.

Resident Margaret Ososki stated that when she and her family first moved to Apple Valley, they had asked the town office where planting was permitted and had been told they could plant along their property line. She noted that this guidance may not have been accurate, as she and other long-term residents have trees within the easement area. She explained that this situation created confusion, especially since residents were initially told one thing but later learned of different restrictions. Mayor Farrar responded that the town sought to work with residents rather than immediately require removal, but if plantings interfered with bar ditch maintenance, they would have to be addressed under the ordinance. Ososki then commented that she preferred bees in the community over the noise of roosters crowing early in the morning, which she found more disruptive.

Resident Dorothy May, who had recently purchased property in Cedar Point, asked whether she was allowed to place a shipping container on her lot. She explained that a neighbor had told her such structures were not permitted and requested clarification on the requirements. The mayor responded that shipping containers were allowed under town ordinance, subject to certain conditions such as size limits, a maximum of one container per half-acre, and the requirement that containers be painted and free of signage. He noted, however, that while the town permitted containers, Cedar Point's CC&Rs might restrict them, and the town could not enforce those private covenants. He advised May to review the CC&Rs but confirmed that, from the town's perspective, she was welcome to have a shipping container if it met ordinance standards.

PUBLIC HEARING

1. Ordinance O-2025-32, Amend Water Department Policies and Procedures 1.02.050 Procedures For Other Work On Water System.

Mayor Farrar presented Ordinance O-2025-32, amending Water Department Policies and Procedures 1.02.050 regarding other work on the water system. He explained that the proposed change would require the water operator to verify the presence and location of emergency shut-off valves before any contractor performed work on the system. If no valve was available to isolate the affected area, the contractor or property owner would be required to install one prior to beginning work. The mayor stated that this measure was intended to prevent town-wide outages when damage occurred and instead allow only a limited number of homes to be temporarily affected. He noted that residents would be notified in advance of any short water shut-offs needed to install valves, emphasizing that such planned interruptions were preferable to unexpected community-wide outages. Mayor Farrar opened the public hearing. No public comments. Mayor Farrar closed the public hearing.

2. Resolution R-2025-20, Amending the Town Fee Schedule to include the Apple Valley Water Department Fees.

Mayor Farrar opened the public hearing on Resolution R-2025-20, which amended the town fee schedule to include Apple Valley Water Department fees. He clarified that no fees were being changed, but that the fees previously managed under Big Plains Water needed to be incorporated into the town's schedule since the department was now administered by Apple Valley. The mayor also noted two typographical errors in the draft document: the fee listed as \$47 for usage between 55,001 and 75,000 gallons should be \$4, and the fee listed as \$4700 75 for usage over 100,000 gallons should be \$7. He explained that these errors would be corrected prior to final approval. No public comments. Mayor Farrar closed the public hearing.

DISCUSSION AND ACTION

3. Special Event Permit Application on Friday October 3, 2025 for Grand Circle Trailfest at Ruby Rider Ranch - Main Street.

Mayor Farrar introduced item number three, a special event permit application for the Grand Circle Trailfest at Ruby Rider Ranch on Main Street, scheduled for Friday, October 3, 2025. He explained that this was a smaller, one-day version of a previous three-day event and noted that no significant issues had arisen during the earlier event aside from minor dust concerns, which the coordinator had addressed by bringing in additional water trucks. For this application, the mayor required that parking areas be watered every two hours throughout the event to control dust and that a deposit be provided to cover any potential violations. He stated that the organizers were aware of drone regulations and had agreed to the dust control requirements. He also commented that the event was not expected to be very large. Council members had no questions or concerns.

MOTION: Council Member Taylor moved that we approve the Special Event Permit Application on Friday October 3, 2025 for Grand Circle Trailfest at Ruby Rider Ranch - Main Street.

SECOND: The motion was seconded by Council Member Sair.

VOTE: Mayor Farrar called for a vote:

Council Member Taylor - Aye

Council Member Sair - Aye

Mayor Farrar - Aye

Council Member Palmer - Aye

Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

4. Ordinance O-2025-25, Proposed Zone Change, Rural Estates 10 Acres Zone (RE-10) to Rural Estates 5 Acres Zone (RE-5) for 2745 N Purple Sage Rd, AV-1311-V.

*Planning Commission recommended approval on August 13, 2025.

The council considered Ordinance O-2025-25, a proposed zone change for property located at 2745 North Purple Sage Road (parcel AV-1311-V). The request, submitted by Jordan Holm, sought to rezone the 20 acre property from Rural Estates 10 Acres (RE-10) to Rural Estates 5 Acres (RE-5) in order to create additional lots for family use. Mayor Farrar noted that the surrounding area was already zoned with smaller lot sizes, primarily RE-1, and stated that the Planning Commission had recommended approval on August 13, 2025. He explained that following the zone change, the applicant would be required to apply for a lot split and provide engineered plans to ensure proper road access to any newly created parcels, clarifying that the town would not allow landlocked properties as had occurred in the past.

MOTION: Council Member Taylor moved we approve Ordinance O-2025-25, Proposed Zone Change, Rural Estates 10 Acres Zone (RE-10) to Rural Estates 5 Acres Zone (RE-5) for 2745 N Purple Sage Rd, AV-1311-V. Planning Commission recommended approval on August 13, 2025.

SECOND: The motion was seconded by Council Member Sair.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

5. Ordinance O-2025-29, Proposed zone change from Open Space Transition (OST) and General Commercial (C-3) to Planned Development Overlay (PDO) for 525.73 acres in the Oculita Roca Development, submitted by De La Tierra Holdings LLC.

*Planning Commission recommended approval on August 13, 2025.

The council considered Ordinance O-2025-29, a proposed zone change for 525.73 acres in the Oculita Roca development submitted by De La Tierra Holdings LLC. The request sought to change the zoning from Open Space Transition (OST) and General Commercial (C-3) to a Planned Development Overlay (PDO). Mayor Farrar explained that the project would expand from 18 existing five-acre lots to 57 lots, all of which would remain a minimum of five acres. The development area would grow from 204 acres to 728 acres while preserving 98 percent as open space. He emphasized that maintaining large minimum lot sizes would help protect the town from denser development in the future. The mayor also noted that the expansion, together with planned short-term rentals, would position the town to implement a resort fee tax on such rentals, generating additional revenue from tourism. He added that the related development agreement addendum would be addressed under the following agenda item. The Planning Commission had recommended approval of the zone change on August 13, 2025.

MOTION: Council Member Sair motioned we approve Ordinance O-2025-29, the Proposed zone change from Open Space Transition (OST) and General Commercial (C-3) to Planned Development Overlay (PDO) for 525.73 acres in the Oculita Roca Development, recommended by the Planning Commission on August 13, 2025.

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

6. Ordinance O-2025-30, Development Agreement Addendum with Hidden Rock Development Group, Oculita Roca Project.

*Planning Commission recommended approval on August 13, 2025.

The council considered Ordinance O-2025-30, an addendum to the development agreement with Hidden Rock Development Group for the Oculita Roca project. Mayor Farrar explained that the addendum reflected the expansion previously discussed under the related zone change, increasing the project from 18 to 57 lots on 728 acres while maintaining 98 percent open space. He noted that the developers had also agreed to donate \$300,000 to the town for slurry sealing roads, which would allow every road in Cedar Point, Apple Valley proper, and the original Apple Valley south of the highway to be slurry sealed, restriped, and patched as needed. The mayor stated that this funding would free budget resources for other needs and emphasized that all required infrastructure, including pipelines, turn lanes, and the million-gallon water tank, would be completed before any lots were developed.

Resident Travis Wells asked about the timing of the \$300,000 road donation, the possibility of project roads being designated as private rather than public, and the fee for the zone change. Town representatives confirmed that the zone change fee had been paid and offered to provide him with additional details during open office hours.

Mayor Farrar indicated confidence that the developers would follow through promptly on their commitments once financing was finalized.

MOTION: Council Member Taylor moved we approve Ordinance O-2025-30, Development Agreement Addendum with Hidden Rock Development Group, Oculita Roca Project. Planning Commission recommended approval on August 13, 2025.

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

7. Ordinance O-2025-31, Amend Title 10.10.010 General Purposes.

*Planning Commission recommended approval on August 13, 2025.

Mayor Farrar explained that the map had been brought current with recent zone changes and Sunrise Engineering. The Planning Commission recommended approval on August 13, 2025.

MOTION: Council Member Taylor moved we approve Ordinance O-2025-31, Amend Title 10.10.010 General Purposes. Planning Commission recommended approval on August 13, 2025.

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

8. Resolution R-2025-19, Amend Purchasing Policy Section III Criteria For Using Procurement Processes.

The council reviewed Resolution R-2025-19 to update the purchasing policy. Mayor Farrar explained the proposal raised the purchasing limit from \$12,000 to \$50,000, allowing approvals with three quotes but without a public bid, and designated the mayor as the purchasing agent. He noted the change aligned with state law and reduced unnecessary costs and delays.

MOTION: Council Member Taylor moved that we approve the Resolution R-2025-19, Amend Purchasing Policy Section III Criteria For Using Procurement Processes.

SECOND: The motion was seconded by Council Member Sair.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

9. Ordinance O-2025-32, Amend Water Department Policies and Procedures 1.02.050 Procedures For Other Work On Water System.

The council considered Ordinance O-2025-32, amending Water Department Policies and Procedures 1.02.050 regarding other work on the water system. Mayor Farrar explained that the ordinance would require the town's water operator to locate and confirm emergency shut-off valves before contractors began any work. He stated that the change stemmed from a recent incident where staff were unable to find a valve despite guidance from the previous water operator, forcing the town to shut off an entire street when only a small area should have been affected. He emphasized that the new requirement would prevent similar disruptions and ensure contractors could isolate smaller service areas in the event of a problem.

Council Member Sair supported the change, calling it a "no brainer" that would save time, reduce confusion, and avoid unnecessary outages. Staff described ongoing work to identify and uncover valves that had been paved over or buried, with concrete collars being placed around them for easier access. The town was also implementing a new digital mapping system through ESRI to catalog valves and record which areas they served. This would allow staff to quickly identify which neighborhoods or facilities could be shut off in the event of an emergency. The mapping project, funded with approximately \$70,000 from the pipeline budget, was still in progress but already improving operations. The mayor concluded that the ordinance was essential to avoid passing ongoing infrastructure problems to future councils and ensure the system was properly maintained as the town continued to grow.

MOTION: Council Member Sair motioned we approve Ordinance O-2025-32, Amended Water Department Policies and Procedures 1.02.050 Procedures For Other Work On Water System.

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

10. Resolution R-2025-20, Amending the Town Fee Schedule to include the Apple Valley Water Department Fees.

The council considered Resolution R-2025-20, amending the town fee schedule to include the Apple Valley Water Department fees. Mayor Farrar explained that this item had already been discussed during the earlier public hearing and clarified again that no fees were being changed. The resolution simply transferred the existing fees from the former Big Plains Water Special Service District into the Town of Apple Valley's fee schedule now that the town had assumed direct responsibility for the water department.

MOTION: Council Member Taylor moved we approve Resolution R-2025-20, Amending the Town Fee Schedule to include the Apple Valley Water Department Fees and typos "\$47 dollars" should be "\$4.00 dollars" and \$4700 75" should be "\$7.00 dollars".

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a Roll Call vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

CONSENT AGENDA

11. Minutes: July 16, 2025 - Town Council Hearing and Meeting.
12. Disbursement Listing for July 2025.
13. Budget Report for Fiscal Year 2025 through July 2025.
14. July 2025 Water Usage Comparison.

MOTION: Council Member Sair motioned we approve number 11. Minutes: July 16, 2025 - Town Council Hearing and Meeting, number 12. Disbursement Listing for July 2025, number 13. Budget Report for Fiscal Year 2025 through July 2025, and 14. July 2025 Water Usage Comparison.

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

REQUEST FOR A CLOSED SESSION: IF NECESSARY

No request.

ADJOURNMENT

MOTION: Council Member Sair motioned to adjourn.

SECOND: The motion was seconded by Council Member Palmer.

VOTE: Mayor Farrar called for a vote:

Council Member Taylor - Aye
 Council Member Sair - Aye
 Mayor Farrar - Aye
 Council Member Palmer - Aye
 Council Member Spendlove - Absent

The vote was unanimous and the motion carried.

Meeting adjourned at 6: 50 PM

Date Approved: _____

Approved BY: _____
Mayor | Michael L. Farrar

Attest BY: _____
Recorder | Jenna Vizcardo

DRAFT