




**TischlerBise**

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**CHEROKEE COUNTY**

Est. 1897

# Proposal for an Impact Fee Study

Cherokee County, South Carolina

February 9, 2026



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## Section 1: Cover Letter

February 9, 2026

Mr. Marvin Bishop, Jr., County Administrator  
Cherokee County  
110 Railroad Avenue  
Gaffney, South Carolina 29340

***RE: Qualifications for an Impact Fee Study***

Dear Merv:

TischlerBise is pleased to submit this proposal to prepare an Impact Fee Study for the County. We feel that our firm is ideally suited to undertake this project based on our extensive national and South Carolina impact fee experience. There are several points we would like to note that make our qualifications unique:

- **Depth of Experience.** TischlerBise has been in business now for almost fifty years. Our firm specializes in fiscal/economic impact analysis, development fees and infrastructure financing strategies, and market analysis. consulting firm. Our qualified team of six professionals bring an unparalleled depth of experience to this assignment. **We have prepared over 1,100 impact fee studies across the country – more than any other firm.** We are innovators in the field, pioneering approaches for credits, impact fees by size of housing unit, and distance-related/tiered impact fees. More importantly, a TischlerBise impact fee methodology has never been challenged in a court of law.
- **Technical Knowledge of Land Use Planning and Local Government Finance.** The County requires consulting expertise in the areas of infrastructure planning/finance, land use planning and growth management in the State of South Carolina. **Many communities overlook the fact that impact fees are a land use regulation.** The TischlerBise team will apply years of development fee experience within the context of overall County financial needs, land use, and economic development policies. This will lead to a work product that is both defensible and that promotes equity.
- **National Thought Leaders.** Both of the TischlerBise principals for this assignment are considered national thought leaders on the subjects of impact fees, infrastructure financing strategies, and fiscal/economic sustainability. Carson Bise, AICP, recently Chaired the American Planning Association's Paying for Growth Task Force and was recently named an Affiliate of the National Center for Smart Growth Research & Education. Mr. Bise served on the Board of Directors for the Growth and Infrastructure Consortium, where he is a frequent presenter at the annual conference. Both Mr. Bise and Ms. Herlands are frequent speakers on impact fees and infrastructure financing at the state and national level for the American Planning Association, National Association of Homebuilders, Urban Land Institute, and the Government Finance Officers Association.

- **Consensus Builders.** Our seasoned Project Team has actively participated in legislative body meetings and citizen committees to educate stakeholders regarding the technical process of impact fee calculations as well as the pros and cons of impact fees,

As the President of TischlerBise, I have the authority to negotiate and contractually bind the firm. We look forward to the possibility of working with Cherokee County and are committed to providing cost-effective, high-quality support for this assignment. This proposal shall remain valid for a period of 120 days.

Sincerely,



L. Carson Bise II, AICP, President  
TischlerBise  
4701 Sangamore Road S240  
301.320.6900 x12  
carson@tischlerbise.com

## Section 2: Qualifications and Experience

TischlerBise, Inc., was founded in 1977 as Tischler, Montasser & Associates. The firm became Tischler & Associates, Inc., in 1980 and TischlerBise, Inc., in 2005. The firm is a Subchapter (S) corporation, is incorporated in Washington, D.C., and maintains offices in Bethesda, Maryland and Boise, Idaho. The firm's legal address is:

### Principal Office

L. Carson Bise, AICP, President  
 4701 Sangamore Rd, Suite 240  
 Bethesda, MD 20816  
 301.320.6900 x12 (w) | 301.320.4860 (f)  
 carson@tischlerbise.com

TischlerBise is a fiscal, economic, and planning consulting firm specializing in fiscal/economic impact analysis, impact fees, market feasibility, infrastructure financing studies, and related revenue strategies. Our firm has been providing consulting services to public agencies for over thirty years. In this time, we have prepared over **1,000 fiscal/economic impact evaluations and over 1,100 impact fee/infrastructure financing studies** – more than any other firm. Through our detailed approach, proven methodology, and comprehensive product, we have established TischlerBise as the leading national expert on revenue enhancement and cost of growth strategies.

TischlerBise consistently exceeds our client's expectations, which is due in large part to the **heavy involvement of our highly skilled principal-level professionals**. We are proud of the fact that most of our clients retain TischlerBise for return engagements.

### TischlerBise South Carolina Experience

In addition to our unsurpassed national experience, an important factor to consider related to this work effort is our relevant experience working in the State of South Carolina, which makes us quite familiar with the local government revenue structures as well as the planning issues facing South Carolina jurisdictions. A summary of our South Carolina impact fee experience is shown below.

CLIENT	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
Aiken County	◆				◆	◆					
Anderson School District 1											◆
Beaufort County	◆						◆		◆		◆
Clemson		◆	◆			◆	◆				
Clinton		◆	◆		◆	◆	◆				
Clover School District											◆

CLIENT	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
Dorchester District 2											◆
Dorchester District 4											◆
Easley	◆				◆	◆	◆				
Fort Mill School District					◆	◆	◆				◆
Fountain Inn					◆	◆	◆				
Georgetown County	◆				◆	◆			◆		
Greer	◆										
Horry County					◆	◆	◆		◆		
Inman					◆	◆	◆				
Jasper County					◆	◆	◆				
Jasper County School District											◆
Lancaster County					◆	◆	◆				
Lancaster County School District											◆
Lexington County, SC					◆	◆					
Moncks Corner		◆			◆	◆	◆			◆	
North Augusta	◆				◆	◆	◆				
Pageland		◆	◆		◆	◆	◆				
Summerville	◆					◆	◆			◆	
Tega Cay		◆			◆		◆				
Woodruff					◆	◆	◆				
York School District 1											◆
York County	◆					◆	◆			◆	

## TischlerBise National Experience

TischlerBise is the national leader in advancing the “state of the practice.” For example, TischlerBise pioneered development fees by housing size and/or bedroom count, tiered transportation fee schedules, techniques for mitigating high fees for nonresidential development, and integrating transportation impact fees as part of an overall funding strategy. While every community is unique, this national experience provides invaluable perspective for our clients. [A summary of our national development fee experience over the past five years is shown below.](#)

STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
AZ	Apache County	◆											
AZ	Apache Junction		◆				◆	◆	◆		◆	◆	
AZ	Avondale		◆	◆	◆		◆	◆	◆		◆	◆	
AZ	Buckeye		◆	◆	◆		◆		◆		◆	◆	
AZ	Casa Grande		◆	◆			◆	◆	◆		◆	◆	
AZ	Cave Creek		◆	◆	◆				◆	◆		◆	
AZ	El Mirage			◆	◆		◆	◆	◆			◆	
AZ	Eloy			◆	◆		◆		◆		◆	◆	
AZ	Flagstaff	◆	◆				◆	◆	◆		◆	◆	
AZ	Gilbert		◆		◆		◆	◆			◆		
AZ	Glendale			◆	◆	◆	◆	◆	◆		◆	◆	
AZ	Goodyear		◆	◆	◆		◆	◆	◆		◆		
AZ	Maricopa	◆	◆				◆	◆	◆	◆	◆	◆	
AZ	Navajo County	◆	◆					◆					
AZ	Peoria	◆	◆				◆	◆	◆	◆	◆	◆	
AZ	Phoenix		◆				◆	◆	◆	◆	◆		
AZ	Pinal County	◆	◆				◆		◆				
AZ	Queen Creek		◆	◆	◆		◆	◆		◆	◆	◆	
AZ	Safford			◆	◆								
AZ	San Luis		◆	◆	◆	◆	◆	◆	◆				
AZ	Sedona		◆			◆	◆		◆			◆	
AZ	Show Low	◆	◆	◆	◆		◆		◆		◆		
AZ	Sierra Vista		◆				◆	◆	◆	◆	◆		
AZ	Somerton		◆	◆	◆	◆	◆	◆	◆				
AZ	Surprise		◆	◆	◆		◆	◆	◆		◆	◆	
AZ	Taylor	◆	◆				◆	◆	◆			◆	
AZ	Wellton		◆	◆	◆	◆	◆	◆	◆				
AZ	Yuma		◆	◆		◆	◆	◆	◆	◆		◆	
CA	El Centro						◆	◆	◆		◆	◆	
CA	Imperial County	◆											
CA	Mammoth Lakes		◆			◆	◆		◆	◆		◆	
CA	Suisun City		◆						◆			◆	
CA	Temecula		◆	◆	◆		◆		◆	◆	◆	◆	
CA	Tulare		◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	
CA	Visalia								◆		◆	◆	

STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
CO	Boulder		◆				◆	◆	◆	◆	◆		
CO	Castle Rock		◆			◆	◆	◆	◆		◆		
CO	Colorado Springs		◆										
CO	Erie		◆					◆	◆		◆		
CO	Evans		◆										
CO	Fort Collins		◆										
CO	Greeley		◆	◆			◆	◆					
CO	Larimer County		◆										
CO	Longmont		◆				◆				◆		
CO	Louisville	◆	◆					◆	◆	◆	◆		
CO	Mead		◆					◆			◆		
CO	Thornton		◆				◆	◆	◆		◆		
CO	Vail		◆										
FL	Islamorada							◆	◆			◆	
FL	Manatee County		◆				◆	◆	◆	◆		◆	◆
FL	Manatee County Schools												◆
FL	Miami	◆					◆	◆	◆	◆		◆	◆
FL	North Miami	◆		◆	◆		◆	◆	◆	◆	◆	◆	
FL	Parkland						◆		◆				
FL	Pasco Co. School Board												◆
FL	Port St. Lucie								◆			◆	
FL	Punta Gorda		◆				◆	◆	◆		◆	◆	
FL	South Miami		◆						◆				
FL	Stuart		◆				◆	◆	◆			◆	
GA	Effingham County		◆	◆	◆		◆		◆		◆		
GA	Roswell		◆					◆	◆		◆		
ID	Hailey		◆	◆	◆		◆	◆	◆	◆	◆	◆	
ID	Hayden		◆				◆		◆				
ID	Post Falls	◆	◆				◆		◆				
ID	Sandpoint		◆					◆	◆	◆			
ID	Shoshone Co. Fire Dept							◆					
ID	Victor		◆				◆	◆	◆				
LA	Covington			◆	◆								
MD	Frederick		◆										
MD	Frederick County		◆				◆	◆	◆		◆	◆	◆

STATE	CLIENT	Feasibility Analysis	Roads/Transportation	Sewer	Water	Stormwater	Law Enforcement	Fire/EMS	Parks and Recreation	Trails/Open Space	Libraries	General Government	Schools
MD	Hagerstown		◆				◆		◆			◆	
MD	Hampstead				◆		◆		◆				
MT	Belgrade	◆	◆	◆	◆			◆	◆				
MT	Bozeman		◆	◆	◆			◆					
MT	Corvallis School District												◆
MT	Manhattan			◆	◆								
MT	Missoula						◆	◆	◆	◆		◆	
MT	Missoula Co.						◆	◆	◆				
MT	Polson			◆	◆				◆				
MT	Ravalli County	◆											
NC	Orange County								◆	◆			◆
NM	Las Cruces			◆	◆								
NV	North Las Vegas	◆						◆					
NV	Nye County		◆			◆	◆	◆	◆				
NV	Washoe County		◆										
OH	Delaware						◆	◆	◆			◆	
OH	Lebanon		◆						◆				
RI	Middletown			◆			◆	◆	◆			◆	◆
UT	Mapleton			◆	◆	◆		◆	◆	◆			
UT	North Logan	◆	◆	◆	◆				◆	◆			
UT	Pleasant Grove	◆	◆	◆	◆		◆	◆	◆				
UT	Sandy City		◆			◆	◆	◆		◆			
UT	Spanish Fork	◆		◆	◆	◆			◆				
UT	West Jordan		◆	◆	◆	◆	◆	◆	◆				
VA	Stafford County		◆										
VA	Suffolk			◆	◆								
WV	Jefferson County						◆	◆	◆			◆	◆
WY	Casper	◆	◆					◆	◆				
WY	Cheyenne		◆				◆	◆	◆			◆	◆

## Section 3: Consultant Team Comparable Projects

Below are summaries of previous projects that highlight our Team's capacity and ability to complete the County's project. We have only listed projects with which our Project Team members were associated.

### **Town of Moncks Corner, South Carolina – Impact Fee Study (2025)**

Project Contact: Justin Westbrook, Community Development Director

Phone: (843) 719-7913

E-mail: [j.westbrook@monckscornersc.gov](mailto:j.westbrook@monckscornersc.gov)

TischlerBise Staff: Carson Bise and Jack Tintle

TischlerBise recently completed the first Impact Fee Study for the Town of Moncks Corner. The study contained impact fees for parks and recreation, solid waste, police, fire and intersection enhancements. **As part of this analysis, TischlerBise prepare police and fire fees using both plan-based approach, as well as the incremental expansion approach for the Town's consideration.**

### **City of Tega Cay, South Carolina – Impact Fee Study (2019 and 2022)**

Project Contact: Charlie Funderburk, City Manager

Phone: (803) 548-3512

E-mail: [CFunderburk@tegacaysc.gov](mailto:CFunderburk@tegacaysc.gov)

TischlerBise Staff: Carson Bise and Julie Herlands

TischlerBise was retained to prepare and implement the City's first impact program. The fee categories included Parks and Recreation, Police, Fire, Water and Wastewater. This assignment included determining capital improvement plans and calculating impact fees for each fee category. For several fee categories, TischlerBise prepared both a plan-based approach and consumption-based approach in order to gauge the magnitude of City General Fund exposure/commitment.

### **Horry County, South Carolina – Impact Fee Study (2004, 2019, and 2022)**

Project Contact: David Jordan, Planning Director

Phone: (843) 915-5340

E-mail: [jordan.david@horrycountysc.gov](mailto:jordan.david@horrycountysc.gov)

TischlerBise Staff: Carson Bise, Julie Herlands, and Colin McAweeney

TischlerBise has completed three impact studies for Horry County over the last twenty years. Our studies have addressed Parks & Recreation, Public Safety (Police, Fire & Medic, and Emergency Operations Center), Transportation, Solid Waste, and Stormwater facilities. The County adopted fees for all categories with the exception of Transportation and Stormwater facilities in 2019. In 2022, TischlerBise was retained again at the County Commission's behest to update the fee study. However, political will still did not exist to adopt Transportation and Stormwater impact fees.


### **Fort Mill School District, South Carolina – School Impact Fee Study (2019)**

Project Contact: Leanne Lordo, Assistant Superintendent for Finance and Operations

Phone: (803) 548-8212

E-mail: [LordoL@fortmillschools.org](mailto:LordoL@fortmillschools.org)

TischlerBise Staff: Carson Bise and Ben Griffin



TischlerBise recently completed an update to the District's school impact fee to come into compliance with the most recent South Carolina Development Impact Fee Act. This assignment included several work sessions with the School Board, Planning Commission, and County Council.

**Greer, South Carolina – Impact Fee Study (2021, 2024)**

Project Contact: Andrew Merriman, City Administrator

Phone: (864) 848-2150

E-mail: [amerriman@cityofgreer.org](mailto:amerriman@cityofgreer.org)

TischlerBise Staff: Carson Bise, Ben Griffin, and Colin McAweeney

TischlerBise recently completed an impact fee for the City of Greer that includes parks/recreation, police and fire. These impact fees (adopted in the Fall of 2024), augment the annexation fees TischlerBise developed in 2021, which only apply to new development projects being annexed into the City of Greer.

**Woodruff, South Carolina – Impact Fee Study (2021)**

Project Contact: Lee Bailey, City Manager

Phone: (864) 476-81542

E-mail: [lbailey@cityofwoodruff.com](mailto:lbailey@cityofwoodruff.com)

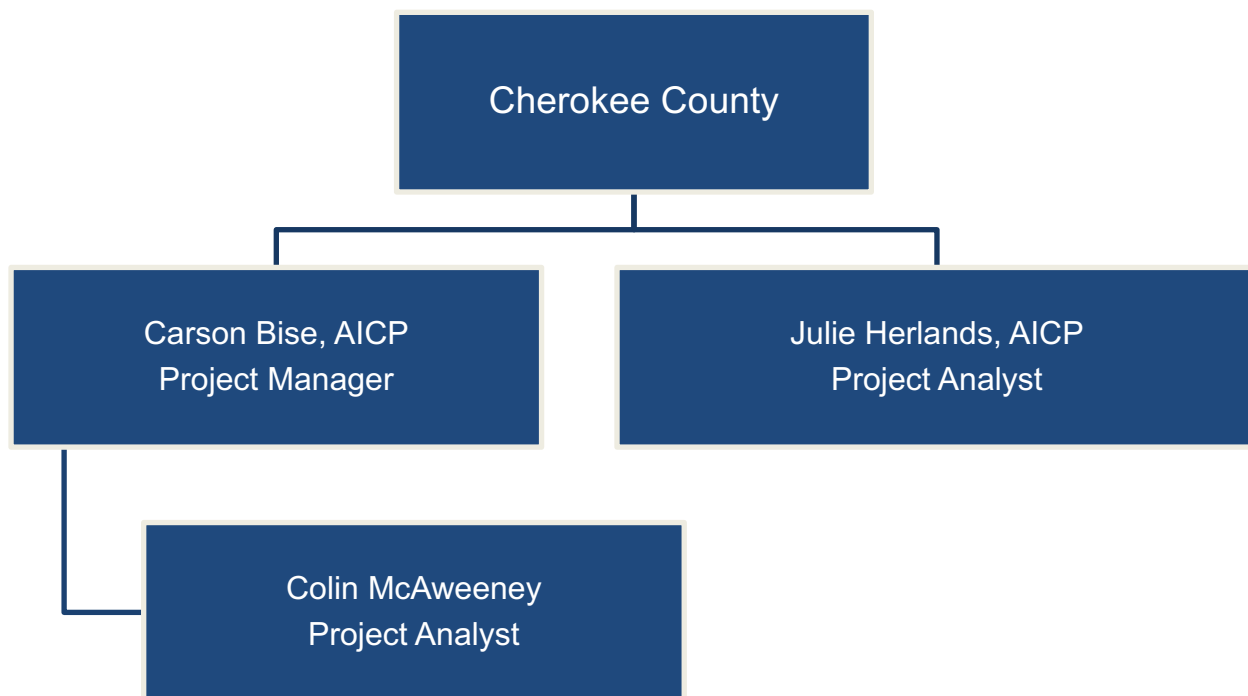
TischlerBise Staff: Carson Bise and Ben Griffin

TischlerBise recently completed an impact fee study for the City of Woodruff. This study included fees for parks/recreation and police. Historically, the City of Woodruff has not seen much development. However, a significant amount of new development has been approved that will have a significant impact on the City's ability to maintain existing levels of park and police infrastructure. To address this situation, the City decided to examine the feasibility of adopting impact fees.

## Section 4: Project Team

### Project Staffing

To successfully navigate through the County's impact fee study, the successful consultant must possess specific, detailed, and customized knowledge, not only of the technical analysis, but also of the context of the impact fee structure in achieving the County's land use and economic development policy goals. **Our Project Team for this assignment includes our most senior and experienced impact fee professionals.** We have unsurpassed experience performing projects requiring the same expertise as that needed to serve Cherokee County. The role of each team member and their qualifications are briefly discussed in this section, and the organizational chart shows our project team for this assignment.



**Carson Bise, AICP**, President of TischlerBise, will serve as Project Manager and coordinate our interaction with the County to ensure that all work is completed properly, on time, and within budget. He will work closely with Mr. McAweeney developing and reviewing all aspects of the project and providing overall quality assurance for the project.

**Colin McAweeney**, Western Region Manager, will serve as Project Manager for this assignment. Mr. McAweeney has been with TischlerBise for seven years and is the Project Manager for many of our Arizona assignments, which have the most stringent impact fee enabling legislation in the country. **Mr. McAweeney heads our Boise office and was the primary analyst on our impact fee studies for Beaufort County, Easley, Lexington County, and Lancaster County.**

**Julie Herlands, AICP**, Vice President of TischlerBise, will serve as a Project Analyst for this assignment because of her substantial experience preparing impact fees and financing strategies, as well as her strong project management skills. Ms. Herlands will assist with controlling the work in progress and will assist with

the technical requirements of the project. Most importantly, Ms. Herlands, in conjunction with Mr. Bise, will ensure constant collaboration and communication between County staff and our team through frequent progress memorandums, conference calls, and in-person meetings. **Ms. Herlands was the project manager for our recent impact fee study for Horry County** and has led a wide range of economic, fiscal impact, and impact fee/infrastructure finance experience in over 15 states.

Complete staff resumes are shown below.

## L. Carson Bise, II, AICP, President

Carson Bise has thirty years of fiscal, economic, and planning experience and has conducted fiscal and infrastructure finance evaluations in forty states. **Mr. Bise is a leading national figure in the calculation of impact fees, having completed over 350 impact fee studies.** In his seven years as a planner at the local government level, he coordinated Capital Improvement Plans, conducted market analyses and business development strategies, and developed comprehensive plans. Mr. Bise has also written and lectured extensively on fiscal impact analysis and infrastructure financing. **His most recent publications are *Next Generation Transportation Impact Fees* and *Fiscal Impact Analysis: Methodologies for Planners***, both published by the American Planning Association, a chapter on fiscal impact analysis in the book *Planning and Urban Design Standards*, also published by the American Planning Association, and the ICMA IQ Report, *Fiscal Impact Analysis: How Today's Decisions Affect Tomorrow's Budgets*. **Mr. Bise is currently on the Board of Directors of the Growth and Infrastructure Finance Consortium and recently Chaired the APA's Paying for Growth Task Force. He was also recently named an Affiliate of the National Center for Smart Growth Research & Education.**

### EDUCATION

M.B.A., Economics, Shenandoah University

Bachelor of Science, Geography/Urban Planning, East Tennessee State University

Bachelor of Science, Political Science/Urban Studies, East Tennessee State University

### SELECTED IMPACT FEE AND INFRASTRUCTURE FUNDING STRATEGY EXPERIENCE

- Apache Junction, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Avondale, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Buckeye, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Camp Verde, Arizona – *Impact Fee Study*
- Coolidge, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Glendale, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Eloy, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Flagstaff, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Pinetop-Lakeside, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Sedona, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Sierra Vista, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Somerton, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Wellton, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Yuma, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Avenal, California – *Impact Fee Study*

- National City, California – *Impact Fee Study*
- Tulare, California – *Impact Fee Study*
- Boulder, Colorado – *Impact Fee/Excise Tax Study*
- Erie, Colorado – *Impact Fee Study*
- Evans, Colorado – *Impact Fee Study*
- Greeley, Colorado – *Impact Fee Study*
- Longmont, Colorado – *Impact Fee Study*
- Louisville, Colorado – *Impact Fee Study*
- Steamboat Springs, Colorado – *Impact Fee Study*
- Thornton, Colorado – *Impact Fee Study*
- Vail, Colorado – *Impact Fee Study*
- DeSoto County, Florida – *Impact Fee Study*
- Manatee County, Florida – *Impact Fee Study*
- North Miami, Florida – *Impact Fee Study*
- Manatee County, Florida – *School Impact Fee Study*
- School District of Pasco County, Florida – *School Impact Fee Study*
- Frederick County, Maryland – *School Impact Fee Study*
- Hagerstown, Maryland – *Impact Fee Study*
- Hampstead, Maryland – *Impact Fee Study*
- Salisbury, Maryland – *Impact Fee Study*
- Talbot County, Maryland – *Impact Fee Study*
- Washington County, Maryland – *Impact Fee Study*
- Wicomico County, Maryland – *Impact Fee Study*
- Worcester County, Maryland – *Impact Fee Study*
- Broadwater County, Montana – *Impact Fee Feasibility Study*
- Bozeman, Montana – *Impact Fee Study*
- Gallatin Canyon/Big Sky, Montana – *Capital Improvement and Funding Plan*
- Great Falls, Montana – *Impact Fee Feasibility Study*
- Las Cruces, New Mexico – *Water and Sewer Impact Fee Study*
- Aiken County, South Carolina – *Impact Fee Study*
- Beaufort County, South Carolina – *Southern Beaufort County Infrastructure Funding Strategy*
- Beaufort County, South Carolina – *Impact Fee Study*
- Fort Mill School District – *Impact Fee Study*
- Georgetown County, South Carolina – *Impact Fee Study*
- Horry County, South Carolina – *Impact Fee Study*
- Lancaster County, South Carolina – *Impact Fee Study*
- Lexington County, South Carolina – *Public Safety Impact Fee Study*
- York County, South Carolina – *Impact Fee Study*
- Williamson County, Tennessee – *School Impact Fee Study*

#### SPEAKING ENGAGEMENTS

- *Fiscal Impact Assessment*, AICP Training Workshop, APA National Planning Conference
- *Dealing with the Cost of Growth: From Soup to Nuts*, ICMA National Conference

- *Demand Numbers for Impact Analysis*, National Impact Fee Roundtable
- *Calculating Infrastructure Needs with Fiscal Impact Models*, Florida Chapter of the APA Conference
- *Economic Impact of Home Building*, National Impact Fee Roundtable
- *Annexation and Economic Development*, APA National Conference
- *Economics of Density*, APA National Conference
- *The Cost/Benefit of Compact Development Patterns*, APA National Conference
- *From Soup to Nuts: Paying for Growth*, APA National Conference
- *Growing Pains*, ICMA National Conference
- *Mitigating the Impacts of Development in Urban Areas*, Florida Chapter of the APA
- *Impact Fee Basics*, South Carolina Chapter of the APA
- *Impact Fee Basics*, National Impact Fee Roundtable
- *Fiscal Impact Analysis and Impact Fees*, National Impact Fee Roundtable
- *Are Subsidies Worth It?*, APA National Conference

#### PUBLICATIONS

- "Next Generation Transportation Impact Fees," APA, Planners Advisory Service
- "Fiscal Impact Analysis: Methodologies for Planners", APA
- "Planning and Urban Design Standards", APA, Contributing Author on Fiscal Impact Analysis
- "Fiscal Impact Analysis: How Today's Decisions Affect Tomorrow's Budgets", ICMA Press
- "The Cost/Contribution of Residential Development", Mid-Atlantic Builder
- "Smart Growth and Fiscal Realities", ICMA Getting Smart! Newsletter
- "The Economics of Density", AICP Training Series, 2005, Training CD-ROM (APA)

### Julie Herlands, AICP, Vice President

Julie Herlands is Vice President with TischlerBise and has 18 years of planning, fiscal, and economic development experience. Prior to joining TischlerBise, Ms. Herlands worked in the public sector in Fairfax County, Virginia, for the Office of Community Revitalization and for the private sector for the International Economic Development Council (IEDC) in their Advisory Services and Research Department. For IEDC, she conducted a number of consulting projects including economic and market feasibility analyses and economic development assessments and plans. Her economic, fiscal impact, and impact fee/infrastructure finance experience includes a wide-range of assignments in over 15 states. She is a frequent presenter at national and regional conferences including serving as co-organizer and co-presenter at a half-day AICP Training Workshop entitled *Fiscal Impact Assessment* at the American Planning Association National Planning Conference. A session on impact fees and cash proffers presented at the APA National Conference is available through the APA training series, *Best of Contemporary Community Planning*. **She is currently the Immediate Past Chair of the Economic Development Division of the APA and recently chaired the APA Task Force on Planning and Economic Development.**

#### EDUCATION

Masters of Community Planning, University of Maryland  
 Bachelor of Arts, Political Science, University of Buffalo

#### SELECTED IMPACT FEE AND INFRASTRUCTURE FUNDING STRATEGY EXPERIENCE

- Apache Junction Water Company, Arizona – *Water System Connection Fees*

- Apache Junction, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Cave Creek, Arizona *Land Use Assumptions, IIP and Development Fee Study*
- Glendale, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Queen Creek, Arizona – *Development Impact Fees*
- Show Low, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Sedona, Arizona – *Land Use Assumptions, IIP and Development Fee Study*
- Bentonville, Arkansas – *Development Impact Fees*
- Clovis, California – *Sewer Impact Fee*
- Temecula, California – *Development Impact Fee*
- Arapahoe County, Colorado – *Rural Road Funding Strategy*
- Boulder, Colorado – *Development Excise Taxes*
- Castle Rock, Colorado – *Impact Fee Study*
- Erie, Colorado – *Impact Fee Study*
- Longmont, Colorado – *Impact Fee Study*
- Plant City, Florida – *Impact Fee Study*
- Port St. Lucie, Florida – *Impact Fee Study*
- Stuart, Florida – *Impact Fee Study*
- Kellogg, Idaho – *Impact Fee Study*
- Post Falls, Idaho – *Impact Fee Study*
- Shoshone Fire District, Idaho – *Impact Fee Study*
- Evanston, Illinois – *Impact Fee/Excise Tax Study*
- Anne Arundel County, Maryland – *Revenue Strategies*
- Caroline County, Maryland – *Schools Excise Tax Study*
- Dorchester County, Maryland – *Impact Fee Study*
- Salisbury, Maryland – *Impact Fee Study*
- Easton, Maryland – *Impact Fee Study*
- Talbot County, Maryland – *Impact Fee Study*
- Wicomico County, Maryland – *Impact Fee Study*
- Worcester County, Maryland – *Impact Fee Study*
- North Las Vegas – *Impact Fee Study*
- Nye County/Town of Pahrump, Nevada – *Impact Fee Study*
- Cabarrus County, North Carolina – *Voluntary Mitigation Payment Studies (Two School Districts)*
- Catawba County, North Carolina – *School Impact Fee Studies (Three School Districts)*
- Chatham County, North Carolina – *School Impact Fee Study (One School District)*
- Orange County, North Carolina – *School Impact Fee Study (Two School Districts)*
- Abbeville County, South Carolina – *Infrastructure Financing Study*
- Beaufort County, South Carolina – *Infrastructure Financing Study*
- Horry County, South Carolina – *Impact Fee Study*
- Tega Cay, South Carolina – *Impact Fee Study*
- Prince William County, Virginia – *Impact Fee Study*
- Spotsylvania County, Virginia – *Impact Fee Study*
- Stafford County, Virginia – *Impact Fee Study*

## SPEAKING ENGAGEMENTS

- *What Are the Costs to Serve Development?* APA National Planning Conference
- *Local Fiscal Challenges and Planning Solutions*, APA National Planning Conference
- *Cash Proffers and Impact Fees*, APA Virginia Chapter Annual Conference
- *Fiscal Sustainability*, APA Webcast
- *Infrastructure Financing: Funding the Gap*, APA National Planning Conference
- *Economic Development for Planning Practitioners*, Training Workshop, APA National Planning Conference
- *Voluntary Mitigation Payments: An Alternative to Impact Fees*, APA National Planning Conference
- *Proffers vs. Impact Fees: The Virginia Experience*, National Impact Fee Roundtable
- *Impact Fee—Or Is It?* APA National Planning Conference
- *Integrating Planning with School Demands*, APA National Planning Conference
- *Planning and Fiscal Reality*, APA National Planning Conference

## PUBLICATIONS


- “Should Impact Fees Be Reduced in a Recession?”, *Economic Development Now*, August 10, 2009 (International Economic Development Council)
- “Agreements, Fees, and CIP”, *The Best of Contemporary Community Planning*, 2005, Training CD-ROM (APA and Lincoln Institute of Land Policy)

## Colin McAweeney, Western Region Manager

Colin McAweeney is the Western Region Manager and manages the Boise, Idaho office, with specialties in finance and economic development planning. Mr. McAweeney is an industry expert regarding the intersection of land use planning and municipal finance. His expertise ranges from project-level impact analysis to regional fiscal model design and programming. Additionally, McAweeney has completed impact fee and user fee studies in 50+ communities and presented at local- and state-level conferences. Mr. McAweeney co-authored a contribution to the *Journal of Comparative Urban Law and Policy*, “The Evolution of Fiscal Impact Analysis and Where it Needs to Go.” Prior to joining TischlerBise, he finished his master’s degree with a thesis surrounding the urban aspects that attract investment. Before pursuing his M.S., Mr. McAweeney worked in the finance sector for several years where he became familiar with financial markets and business financing.

## SELECTED IMPACT FEE AND INFRASTRUCTURE FUNDING STRATEGY EXPERIENCE

- Lone Tree, Colorado – *Impact Fee Study*
- Parker, Colorado – *Impact Fee Study*
- Nassau County, Florida – *Impact Fee Study*
- Kellogg, Idaho – *Capital Improvement Plan and Impact Fee Study*
- Idaho Falls, Idaho – *Capital Improvement Plan and Impact Fee Study*
- Post Falls, Idaho – *Capital Improvement Plan and Impact Fee Study*
- Portland, Maine – *Impact Fee Study*
- Easton, Maryland – *Impact Fee Study*
- Talbot County, Maryland – *Impact Fee Study*
- Hamilton, Montana – *Capital Improvement Plan and Impact Fee Study*

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- Missoula, Montana – *Capital Improvement Plan and Impact Fee Study*
  - Missoula County, Montana – *Capital Improvement Plan and Impact Fee Study*
  - Las Cruces, New Mexico – *Impact Fee Study*
  - Beaufort County, South Carolina – *Capital Improvement Plan and Impact Fee Study*
  - Easley, South Carolina – *Capital Improvement Plan and Impact Fee Study*
  - Lancaster County, South Carolina – *Capital Improvement Plan and Impact Fee Study*
  - Lexington County, South Carolina – *Capital Improvement Plan and Impact Fee Study*
  - York County, South Carolina – *Capital Improvement Plan and Impact Fee Study*
  - Frederick County, Virginia – *Cash Proffer Study*
  - Fauquier County, Virginia – *Cash Proffer Study*
  - Goochland County, Virginia – *School Cash Proffer Study*
  - Isle of Wight County, Virginia – *Cash Proffer Study*

#### EDUCATION

Master of Science, Urban Management and Development, Erasmus University Rotterdam

Bachelor of Science, Economics with an emphasis on Mathematics, University of Wisconsin - Madison

## Section 5: Project Approach and Suggested Scope of Work

### Project Approach

Impact fees are fairly simple in concept, but complex in delivery. Generally, the jurisdiction imposing the fee must: (1) identify the purpose of the fee, (2) identify the use to which the fee is to be put, (3) show a reasonable relationship between the fee's use and the type of development project, (4) show a reasonable relationship between the facility to be constructed and the type of development, and (5) account for and spend the fees collected only for the purpose(s) used in calculating the fee.

Reduced to its simplest terms, the process of calculating impact fees involves the following two steps:

1. Determine the cost of development-related improvements, and
2. Allocate those costs equitably to various types of development.

There is, however, a fair degree of latitude granted in constructing the actual fees, as long as the outcome is "proportionate and equitable." Fee construction is both an art and a science, and it is in this convergence that TischlerBise excels in delivering products to clients.


Any one of several legitimate methods may be used to calculate impact fees for the County. Each method has advantages and disadvantages given a particular situation, and to some extent they are interchangeable because they all allocate facility costs in proportion to the needs created by development.

In practice, the calculation of impact fees can become quite complicated because of the many variables involved in defining the relationship between development and the need for capital facilities. The following paragraphs discuss the three basic methods for calculating impact fees and how those methods can be applied.

**Plan-Based Fee Calculation** - The plan-based method allocates costs for a specified set of future improvements to a specified amount of development. The improvements are identified by a CIP. In this method, the total cost of relevant facilities is divided by total demand to calculate a cost per unit of demand. The plan-based method is often the most advantageous approach for facilities that require engineering studies, such as roads and utilities.

**Cost Recovery Fee Calculation** - The rationale for the cost recovery approach is that new development is paying for its share of the useful life and remaining capacity of facilities from which new growth will benefit. To calculate an impact fee using the cost recovery approach, facility cost is divided by the ultimate number of demand units the facility will serve. An oversized wastewater treatment plant is an example.

**Incremental Fee Calculation** - The incremental expansion method documents the current level-of-service (LOS) for each type of public facility in both quantitative and qualitative measures, based on an existing service standard such as square feet per capita or park acres per capita. The LOS standards are determined in a manner similar to the current replacement cost approach used by property insurance companies. However, in contrast to insurance practices, clients do not use the funds for renewal and/or replacement of existing facilities. Rather, the jurisdiction uses the impact fee revenue to expand or provide additional facilities as needed to accommodate new development. An incremental



expansion cost method is best suited for public facilities that will be expanded in regular increments with LOS standards based on current conditions in the community.


**Evaluating Alternatives.** Designing the optimum impact fee approach and methodology is what sets TischlerBise apart from our competitors. Unlike most consultants, we routinely consider each of the three methodologies—cost recovery, incremental expansion, and the planned approach—for each component within a fee category. The selection of a particular methodology for each component of the impact fee category will be dependent on which is most beneficial for the County. In a number of cases, we will prepare the impact fee using several methodologies and will discuss the various trade-offs with the County. There are likely to be policy and revenue tradeoffs. **We recognize that “one size does not fit all” and create the optimum format that best achieves our clients’ goals.**

**Consider a Progressive Residential Impact Fee Schedule.** TischlerBise suggests the County consider a fee structure that varies residential impact fees by size of unit. **TischlerBise has been the national leader in this movement toward “progressive” fee structures.** As part of our demographic analysis conducted as part of this assignment, we will prepare data on factors that vary by housing unit size (i.e., persons per unit and vehicle trips) for the County’s consideration prior to development of the fee methodology. Proponents of this approach feel it helps a jurisdiction meet some of its policy objectives related to affordable housing and equity. Ultimately, the County and stakeholders will decide which direction to pursue relative to this policy decision.

**GIS Technology.** TischlerBise routinely utilizes GIS technology to add value to the evaluation of infrastructure needs and to assess financing alternatives. This includes assessing existing land use and performing GIS-based land suitability analyses that can be used to define service areas, project demands for facilities, and coordinate CIP investment for the County. **TischlerBise used GIS in our engagement with Missoula/Missoula County, Montana, to establish a nexus for fire/EMS impact fees that increased with distance from the County center** based on the ratio of capital cost to development units in three service areas (urban, suburban, and rural). Similar GIS evaluations were used in Glendale, AZ; Manatee County, FL; Greeley, CO; Pitkin County, CO; Vail, CO; and Sandpoint, ID.

**Peer Community Survey.** Many communities desire to have a comparison of the proposed impact fees to those in comparable, or peer, communities. This type of survey can be relatively straightforward and obtained from our current work in South Carolina as well as primary research (i.e., online, phone calls, and emails). However, it is important for the consultant compiling the report to understand what is—and is not—included in the fee amounts for a true “apples-to-apples” comparison. For instance, it is important to note what specific components (e.g., intersections) are included in the impact fee calculation. Are there unique elements embedded in an impact fee that makes it relatively high or low compared to other jurisdictions in the region? What are the methodological approaches used and how do those approaches affect the fee? What is the difference between the calculated fees and the adopted fees? For Cherokee County, we will conduct this evaluation to include methodologies employed, fee amounts, and any unique circumstances that should be identified and communicated to staff and stakeholders throughout the process.

**Public Outreach.** TischlerBise believes that open communication and meaningful public involvement are the cornerstones of any process involving impact fees and/or infrastructure funding options. Based upon our experience with impact fees and infrastructure funding efforts across the country and in South Carolina, we anticipate that this study may attract controversy. Therefore, it is important to build a coalition of support



early in the process to educate and inform the public and other key stakeholders about the purpose of the study, and to explain how it will benefit both key constituents (developers) and the general public. It is critical to develop a communications strategy that will offset and correct any misinformation that might proliferate and to provide clear and compelling logic for public adoption of an updated impact fee program. Every community is different, and public engagement should be tailored to the specific needs and desired outcomes of the client. TischlerBise recommends a multi-faceted approach to public outreach and works with the client and key stakeholder groups to develop a robust outreach strategy that includes a project website and social media campaign. An interactive project website provides the public with an online portal to download draft documents, provide comments, view upcoming meeting dates, and monitor the impact fee study process from afar.

## Work Scope

The following is our suggested scope of work for this assignment.

### TASK 1: PROJECT INITIATION / DATA ACQUISITION

During this task, we will meet with County staff to establish lines of communication, review and discuss project goals and expectations related to the project, review (and revise if necessary) the project schedule, request data and documentation related to new proposed development, and discuss County staff's role in the project. The objectives of this initial discussion are outlined below:

- Obtain and review current demographics and other land use information for the County.
- Review and refine work plan and schedule.
- Discuss current and previous work efforts related to this topic.
- Assess additional information needs and required staff support.
- Identify and collect data and documents relevant to the analysis.
- Identify any relevant policy issues.


**Meetings:** One (1) on-site visit to meet with County project management team/County staff as appropriate.

**Deliverables:** 1) Revisions to project schedule, if necessary. 2) Data request memorandum.

### TASK 2: PREPARE LAND USE ASSUMPTIONS AND DEVELOPMENT PROJECTIONS

The purpose of this task is to review and understand the current demographics of the County as they relate to growth and development and determine the likely development future for the County in terms on new population, housing units, employment, and nonresidential building area over the next 10-20 years. Information from the County, as well as TischlerBise's experience preparing market analyses throughout the country will serve as the basis for preparing projections of residential and nonresidential development for consideration by staff. TischlerBise will prepare a plan that includes projections of changes in land uses, densities, intensities, and population for specific service areas. A map of the area(s) to which the land use assumptions apply will also be included in this task.

**Meetings:** Discussions with the County Planning Department will be held as part of Task 1, as well as conference calls as needed. This trip can also be timed to include a meeting with County Council to discuss the fee update process.



**Deliverables:** TischlerBise will prepare a draft technical memorandum discussing the recommended land use factors and projections. After review and sign-off by the County, a final memorandum will be issued, which will become part of the final Impact Fee Report.

### **TASK 3: DETERMINE CAPITAL FACILITY NEEDS AND SERVICE LEVELS**

This Task as well as Tasks 4-6 may vary somewhat depending on the methodology applied to a particular impact fee category. The impact fee study for each facility type would be presented in separate chapters in the impact fee report.

**Identify Facilities/Costs Eligible for Impact Fee Funding.** As an essential part of the nexus analysis, TischlerBise will evaluate the impact of development on the need for additional facilities, by type, and identify costs eligible for impact fee funding. Elements of the analysis include:

- Review facility plans, fixed asset inventories, and other documents establishing the relationship between development and facility needs by type.
- Identify planned facilities, vehicles, equipment, and other capital components eligible for impact fee funding.
- Prepare forecast of relevant capital facility needs.
- Adjust costs as needed to reflect other funding sources.

As part of calculating the fee, the County may include the construction contract price; the cost of acquiring land, improvements, materials, and fixtures; the cost for planning, surveying, and engineering fees for services provided for and directly related to the construction system improvement; and debt service charges, if the County might use impact fees as a revenue stream to pay the principal and interest on bonds, notes or other obligations issued to finance the cost of system improvements. All of these components will be considered in developing an equitable allocation of costs.

**Identify Appropriate Level of Service (LOS) Standards.** We will review needs analyses and LOS for each facility type. Activities related to this Task include:


- Apply defined service standards to data on future development to identify the impacts of development on facility and other capital needs. This will include discussions with staff of the existing versus adopted LOS, as appropriate.
- Ascertain and evaluate the actual demand factors (measures of impact) that generate the need for each type of facility to be addressed in the study.
- Identify actual existing service levels for each facility type. This is typically expressed in the number of demand units served.
- Define service standards to be used in the impact fee analysis.
- Determine appropriate geographic service areas for each fee category.

**Meetings:** Two (2) meetings with County staff to discuss capital facility needs and levels-of-service. This will also be an opportunity to conduct a work session with the County Council.

**Deliverables:** Memoranda as appropriate. Results integrated into Draft/Final Impact Fee Report.

### **TASK 4: EVALUATE DIFFERENT ALLOCATION METHODOLOGIES**

The purpose of this Task is to determine the methodology most appropriate for each impact fee category. Selection of the particular methodology for each component of the impact fee category will depend on which



is most beneficial for the County. In a number of cases, we will prepare the impact fees for a particular infrastructure category using several methodologies and will discuss the trade-offs with the County. This allows the utilization of a combination of methodologies within one fee category. For instance, a plan-based approach may be appropriate for a new building while an incremental approach may be appropriate for support vehicles and equipment. By testing all possible methodologies, the County is assured that the maximum supportable impact fee will be developed. Policy discussions will then be held at the staff and County Council level regarding the trade-offs associated with each allocation method prior to proceeding to the next task.

**Meetings:** One (1) meeting with County staff and County Council to discuss issues related to allocation methodologies

**Deliverables:** “Storyboard” presentation on fee categories. See Task 7.

#### **TASK 5: DETERMINE NEED FOR “CREDITS” TO BE APPLIED AGAINST CAPITAL COSTS**

There are two types of “credits” that are included in the calculation of impact fees, each with specific, distinct characteristics. The first is a credit due to possible double payment situations. This could occur when a property owner will make future contributions toward the capital costs of a public facility covered by an impact fee. The second is a credit toward the payment of an impact fee for the required dedication of public sites and improvements provided by the developer and for which the impact fee is imposed. Both types of credits will be considered and addressed in the impact fee study.

**Deliverables:** Memoranda as appropriate. See Task 7.

#### **TASK 6: CONDUCT FUNDING AND CASH FLOW ANALYSIS**

In order to prepare a meaningful capital funding strategy, it is important to not only understand the gross revenues, but also the capital facility costs and any deficits. In this case, some consideration should be given to anticipated funding sources. This calculation will allow the County to better understand the various revenue sources possible and the amount that would be needed if the impact fees were discounted. The initial cash flow analysis will indicate whether additional funds might be needed or if the funding strategy might need to be changed to have new growth pay its fair share of new capital facilities. This could also affect the total credits calculated in the previous task. Therefore, it is likely that a number of iterations will be conducted in order to refine the cash flow analysis reflecting the capital improvement needs.

**Deliverables:** See Task 7.

#### **TASK 7: PREPARE CAPITAL IMPROVEMENT PLAN, IMPACT FEE REPORTS, PUBLIC PRESENTATIONS**

TischlerBise will prepare a draft report for the County’s review. The report will summarize the need for impact fees (by category) in Cherokee County and the relevant methodologies employed in the calculations. It will also document all assumptions and cost factors. The report will include at a minimum the following information:

- Executive summary.
- A detailed description of the methodologies used during the study.
- A detailed description of all LOS standards and cost factors used and accompanying rationale.
- Capital Improvement Plans for each Impact Fee category
- A detailed schedule of all proposed fees listed by land use type and activity.

- Other information which adequately explains and justifies the resulting recommended fee schedule
- Cash flow analysis.
- Implementation and administration procedures.
- Required Housing Affordability Analysis

Following the County's review of the draft report, we will make mutually agreed upon changes to the impact fee report and issue a final version.

**Potential Impact on Housing Affordability.** As part of the Impact Fee Report, TischlerBise will estimate the effect of imposing the proposed impact fees on the affordability of housing in Cherokee County. The analysis will examine the current household income and housing expenses that burden an average household in the County. Next, the proposed impact fees will be included in the cost burden analysis to identify the effect the proposed impact fees will have on affordable housing in the County.

**Analysis of Peer Community Fee Structures.** In this Task, TischlerBise will prepare a comparative analysis of peer communities' impact fee structures. The analysis will assess how the proposed impact fee structure for the County compares to other peer communities, including noting any differences in fee schedules and methodologies as well as identify any fees that the County does not currently collect that others may.

**Meetings:** One (1) meeting/presentation to present the draft and final Impact Fee Study with the County Council.

**Deliverables:** Draft and final reports and presentation materials for meetings.

#### **TASK 8: PUBLIC OUTREACH**


TischlerBise recommends the County establish an Advisory Committee to assist in the development and review of land use assumptions, capital improvement plans, and impact fees. The purpose of this committee is to allow interested parties designated by the County to understand assumptions and raise questions about the technical demographic, cost, revenue, credit and other data and supporting documentation that is being used in the calculation of impact fees. This will not be a forum to discuss the political and/or philosophical use of fees. Rather it will be an opportunity for these interested parties to understand the soundness and the reasonableness of the technical impact fee methodology.

**Deliverable:** Draft and final reports and presentation materials for meetings.

**Meetings:** Two (2) meetings with Impact Fee Advisory Committee.

#### **Internal Communications**

An essential component of these efforts is frequent, ongoing, and meaningful communication between the consultant team and staff. TischlerBise is known for its hands-on approach, with face-to-face meetings, frequent conference calls, and ongoing email communications an integral part of our work scope. The specific strategy is to use the Scope of Work and Schedule to manage the project. It is recommended that the County identifies a staff Project Manager who serves as a point person between the consultant team and County. It is also recommended that a staff working group/technical committee be identified to provide feedback throughout the study process. This enables effective and efficient processes as well as keeps



relevant staff apprised of the study's progress and content. TischlerBise also recommends periodic briefings with County Administration.

## Accessibility

TischlerBise will attend pre-scheduled meetings with the County in person deploying staff from our Boise office as well as our main office in Maryland. TischlerBise staff regularly travel to our national client base without incident and occasionally will utilize regional trips to add additional unscheduled trips to clients. TischlerBise's regular and repeat work in South Carolina affirms our flexibility and ability to accommodate schedules. Our team will be available via email and phone throughout the study, and our accessibility and availability will continue throughout the term of the Agreement. We encourage you to consult our references regarding our superior accessibility and availability.

## Management/Communication Plan

TischlerBise is a small consulting firm and therefore has to actively and carefully monitor current and projected workloads. The firm does not include personnel on a proposal unless said personnel can devote the time and resources necessary to complete the assignment on time and within budget. We are amenable to a penalty clause once a final work scope and contract have been agreed upon.

TischlerBise utilizes a project management process which ensures our projects are completed on time and within budget, and, most importantly, they yield results that match our clients' expectations. Our project management plan employs the following principles for successful projects:

- First, **we begin by defining the project to be completed.** Based on discussions that occur as part of our Project Initiation task, Carson Bise will identify the final project goals and objectives in collaboration with County staff, list potential challenges to the process, and develop a plan to ensure successful outcomes and effective communication.
- Second, **we will plan the project schedule.** As part of the Project Initiation task, Mr. Bise will work with County staff to create an agreed-upon timetable to meet the project schedule. Prior to beginning the project, Mr. Bise will assign roles that will ensure that the project schedule is met on time and within budget.
- Third, **we will actively manage the project process.** Mr. Bise and Ms. Herlands have a long history of strong project management skills that are supported by past project successes (we encourage you to contact our references in this regard). Mr. Bise will manage the work in progress, provide guidance and oversight to staff, and be accountable to the County for meeting the schedule, budget, and technical requirements of the project.
- Finally, **we will review all project deliverables and communication through a formal quality assurance process** that requires review at the peer level, project manager level, and executive officer level. Prior to the delivery of work product to the County, deliverables will go through a structured quality assurance process involving up to three levels of review and utilizing a formal checklist tool. The first level involves a peer-to-peer review of work products and computer models.



Next, Mr. Bise will be responsible for a second set of reviews comparing the work product to the completed quality checklist form.

## Section 6: Schedule and Fees

### Project Schedule

The following table provides our proposed schedule for completion of this assignment.

PROJECT SCHEDULE FOR CHEROKEE COUNTY, SOUTH CAROLINA			
Tasks	Anticipated Dates	Meetings*	Deliverables
Task 1: Project Initiation/Data Acquisition	Month 1	1	Data Request Memorandum
Task 2: Prepare Land Use Assumptions and Development Projections	Months 1 and 2	1	Technical Memorandum Outlining Recommended Land Use Assumptions
Task 3: Determine Capital Facility Needs and Service Levels	Months 2 through 5	2	Memoranda as Appropriate
Task 4: Evaluate Different Allocation Methodologies	Months 4 and 5	1	"Storyboard" Presentation on Fee Categories
Task 5: Determine Need for "Credits"	Month 5	0	See Task 7
Task 6: Conduct Funding and Cash Flow Analysis	Months 5 and 6	0	See Task 7
Task 7: Prepare CIP and Impact Fee Report, Public Presentations	Months 6 and 7	2	Draft and Final CIP and Impact Fee Study and Presentation Materials
Task 8: Stakeholder Outreach	Months 5 and 6	2	Presentation Materials

\*In some cases it is assumed meetings are held with multiple departments over one (1) trip.

### Project Fees

The following table presents our proposed project fee schedule for this assignment and encompasses the tasks, our anticipated number of meetings, and anticipated deliverables. Please note that this is a fixed fee, not-to-exceed, proposal and includes direct expenses related to the project.

PROPOSED FEE SCHEDULE FOR CHEROKEE COUNTY, SOUTH CAROLINA					
Project Team Member:	Bise	Herlands	McAweeney	Total	
Job Title:	Project Manager	Project Analyst	Project Analyst	Hours	Cost
Hourly Rate	\$250	\$220	\$205		
Task: Project Initiation/Data Acquisition	8	0	8	16	\$3,640
Task: Prepare Land Use Assumptions and Development Projections	8	8	36	52	\$11,140
Task: Calculate Law Enforcement Impact Fee	16	24	44	84	\$18,300
Task: Calculate Road Impact Fee	24	60	78	162	\$35,190
Task: Calculate Parks and Recreation Impact Fee	16	20	60	96	\$20,700
Task: Calculate Solid Waste Impact Fee	16	24	8	48	\$10,920
Task: Calculate EMS Impact Fee	16	36	24	76	\$16,840
Task: Presentations to Planning Commission and County Council	32	0	8	40	\$9,640
<b>Total Cost:</b>	<b>136</b>	<b>172</b>	<b>266</b>	<b>574</b>	<b>\$126,370</b>

# TischlerBise

FISCAL | ECONOMIC | PLANNING

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