

Joint Information Meeting

TOWN COUNCIL & COUNTY COMMISSIONER MEETING

March 6, 2023

3:00 PM

Town Council Chambers

Chair: Hailey Morton Levinson

NOTICE: THE VIDEO AND AUDIO FOR THIS MEETING ARE STREAMED TO THE PUBLIC VIA THE INTERNET AND MOBILE DEVICES WITH VIEWS THAT ENCOMPASS ALL AREAS, PARTICIPANTS AND AUDIENCE MEMBERS. **PLEASE SILENCE ALL ELECTRONIC DEVICES DURING THE MEETING**

I. ZOOM LINK FOR PUBLIC PARTICIPATION

To join, click the link or copy to your browser: <https://us02web.zoom.us/j/83170914687?pwd=Z083d3huSFBVcDZnYlVZUDBKt2tWQT09>

If the link does not work, join at zoom.com with Webinar ID **831 7091 4687** Password: **83001**

or join by phone **+1 669 444 9171** with Webinar ID **831 7091 4687** and Password: **83001**

II. CALL TO ORDER, ROLL CALL, AND ANNOUNCEMENTS

III. PUBLIC COMMENT

This section is reserved for comments on items that are not otherwise included in this agenda. Public comment is limited to 3 minutes. As a general practice, the Electeds will not hold discussion or debate these comments. Nor will they make any decisions presented during this time, but rather refer to staff for follow-up. If you would like to communicate with the Electeds during the meeting, please address them during this open public comment, when public comment is called for on a specific agenda item or send an email to council@jacksonwy.gov and commissioners@tetoncountywy.gov.

IV. CONSENT CALENDAR

A. Meeting Minutes

1. February 6, 2023 Joint Information Meeting
2. February 13, 2023 Special Joint Information Meeting

V. DISCUSSION/ACTION ITEMS

- A. Housing Mitigation Policy - Contract Amendment with WSW Consulting (Chris Neubecker)
- B. Transportation Work Plan (Charlotte Frei)

VI. MATTERS FROM COUNCIL, COMMISSIONERS AND STAFF

VII. PROPOSED ITEMS FOR FUTURE JOINT INFORMATION MEETINGS

- 4/10 Airport Budget Amendment Request - Consent Item
- 4/10 Housing Supply Plan and Housing Department Work Plan (April Norton)
- 4/10 Long Range Planning Indicator Report and Work Plan (Ryan Hostetter)
- 5/1 START Joint Powers Agreement (Tyler Sinclair)

VIII. EXECUTIVE SESSION - COUNTY

Recess or Adjourn to executive session to consider the selection of a site or the purchase of real estate when the publicity regarding the consideration would cause a likelihood of an increase in price in accordance with Wyoming Statute 16-4-405(a)(vii).

Please note that at any point during the meeting, the Chairman or Mayor may change the order of items listed on this agenda. In order to ensure that you are present at the time your item of interest is discussed, please join the meeting at the beginning to hear any changes to the schedule or agenda.

IX. EXECUTIVE SESSION - TOWN

Recess or Adjourn to executive session to consider the selection of a site or the purchase of real estate when the publicity regarding the consideration would cause a likelihood of an increase in price in accordance with Wyoming Statute 16-4-405(a)(vii) and to discuss personnel matters in accordance with Wyoming Statute 16-4-405(a)(ii).

X. ADJOURN

Please note that at any point during the meeting, the Chairman or Mayor may change the order of items listed on this agenda. In order to ensure that you are present at the time your item of interest is discussed, please join the meeting at the beginning to hear any changes to the schedule or agenda.

JOINT INFORMATION PROCEEDINGS
TOWN COUNCIL AND BOARD OF COUNTY COMMISSIONERS MEETING – UNAPPROVED

FEBRUARY 6, 2023

JACKSON, WYOMING

The Jackson Town Council and the Teton County Board of County Commissioners met in a regular joint information meeting (JIM) in the Town Council Chambers located at 150 East Pearl Avenue in Jackson. This meeting was held in-person and through the Zoom platform. Upon roll call the following were found to be present at 3:00 p.m.:

TOWN COUNCIL: Mayor Hailey Morton Levinson, Arne Jorgensen, Jonathan Schechter, Jim Rooks. Jessica Sell Chambers joined the meeting at 3:03 p.m.

COUNTY COMMISSIONERS: Chairman Luther Propst, Natalia Macker, Greg Epstein, Mark Newcomb, and Wes Gardner.

STAFF: Tyler Sinclair, Lea Colasuonno, Floren Poliseo, Stacy Stoker, Tanya Anderson, Riley Taylor, and Steve Ashworth.

PUBLIC COMMENT. There was no public comment.

CONSENT CALENDAR. On behalf of the Town, a motion was made by Jonathan Schechter and seconded by Jim Rooks to approve consent calendar items A-B as presented with the following motions. On behalf of the County, a motion was made by Greg Epstein and seconded by Mark Newcomb to approve consent calendar items A-B as presented with the following motions. No public comment was given on the Consent Calendar.

- A. **Meeting Minutes.** To approve minutes of the January 9, 2023 Regular Joint Information Meeting.
- B. **Special Restriction Templates.** To approve the changes to the Standard Deed Restriction Template for Affordable, Workforce, and Housing Preservation Units as set forth in the staff report dated February 6, 2023 and consistent with any modifications to those changes discussed today.

On behalf of the Town, Mayor Morton Levinson called for the vote. The vote showed all in favor with Jessica Sell Chambers absent. The motion carried for the Town.

On behalf of the County, Chairman Propst called for the vote. The vote showed all in favor. The motion carried for the County.

Sustainable Destination Management Plan Consideration. Tyler Sinclair made staff comment. Crista Valentino and Eric Dombroski gave a presentation on behalf of the Jackson Hole Travel and Tourism Board. Council and Commission held discussion with staff. No motions were made.

Recreation Center Operational Plan – Fees, Cost Recovery, and Affordability. Steve Ashworth made staff comment. Council and Commission held discussion with staff. On behalf of the Town, a motion was made by Jessica Sell Chambers and seconded by Jonathan Schechter to support Teton County/Jackson Parks and Recreation Department to begin the Teton County 45-day public comment period for the proposed FY24/25 Recreation Center Fee Schedule and Fee Discount Program as discussed. Mayor Morton Levinson called for the vote. The vote showed all in favor. The motion carried.

On behalf of the County, a motion was made by Natalia Macker and seconded by Greg Epstein to authorize Teton County/Jackson Parks and Recreation Department to begin the Teton County 45-day public comment period for the proposed FY24/25 Recreation Center Fee Schedule and Fee Discount Program as discussed. Chairman Propst called for the vote. The vote showed all in favor. The motion carried.

Matters from Council, Commissioners and Staff. None.

Executive Session. On behalf of the Town, a motion was made by Jonathan Schechter and seconded by Jessica Sell Chambers to adjourn to executive session to consider the selection of a site or the purchase of real estate when the publicity regarding the consideration would cause a likelihood of an increase in

price in accordance with Wyoming Statute 16-4-405(a)(vii). Mayor Morton Levinson called for the vote. The vote showed all in favor. The motion carried for the Town.

On behalf of the County, a motion was made by Greg Epstein and seconded by Mark Newcomb to adjourn to executive session to consider the selection of a site or the purchase of real estate when the publicity regarding the consideration would cause a likelihood of an increase in price in accordance with Wyoming Statute 16-4-405(a)(vii). Chairman Propst called for the vote. The vote showed all in favor. The motion carried for the County.

The meeting adjourned at 5:10 p.m. Minutes:rt

TOWN OF JACKSON

Hailey Morton Levinson, Mayor

ATTEST:

Riley Taylor, Town Clerk

TETON COUNTY

Luther Propst, Chairman

A TEST:

Maureen Murphy, County Clerk

Publish JH News & Guide: February 15, 2023

**JOINT INFORMATION PROCEEDINGS
TOWN COUNCIL AND BOARD OF COUNTY COMMISSIONERS MEETING**

FEBRUARY 13, 2023

JACKSON, WYOMING

The Jackson Town Council met in conjunction with the Teton County Commission in a joint information meeting (JIM) located in the County Commissioner's Chambers located at 200 S. Willow St. at 1:31 P.M.

I. ROLL CALL. Upon roll call the following were present:

COUNTY COMMISSIONERS: Luther Propst, Chair, Natalia Macker, Vice-Chair, Greg Epstein, and Wes Gardner. Mark Newcomb was absent.

TOWN COUNCIL: Mayor Hailey Morton Levinson, Vice-Mayor Arne Jorgensen, and Jim Rooks. Jonathan Schechter and Jessica Sell Chambers were absent.

II. VOLUNTEER BOARD INTERVIEWS – the following applicants were interviewed for positions on joint volunteer boards:

Parks & Recreation

- Elizabeth Hooper
- Ellie Stratton-Brook (interviewed after Housing Board interviews)

David Scheurn also applied for Parks & Recreation and withdrew his application.

START Board

- Meghan Quinn

Cody Pitz also applied for START Board but did not appear for the interview.

The meeting recessed at 1:46 P.M. and reconvened at 1:56 P.M.

Jackson/Teton County Affordable Housing

- Marion Thurston
- Virginia Kyle
- Matthew Lusins
- Charlie Hunt
- Julien Hass Re-Interview

IV. EXECUTIVE SESSION

On behalf of the County, a motion was made by Commissioner Epstein and seconded by Commissioner Macker to enter executive session pursuant to Wyoming Statute §16-4-405(a)(ii) To consider appointments to volunteer boards, specifically the appointment of a board member as a public officer. Chair Propst called for the vote. The vote showed all in favor and the motion carried for the County.

On behalf of the Town, a motion was made by Councilmember Rooks and seconded by Councilmember Jorgensen to enter executive session pursuant to Wyoming Statute §16-4-405(a)(ii) To consider appointments to volunteer boards, specifically the appointment of a board member as a public officer. Mayor Morton Levinson called for the vote. The vote showed all in favor and the motion carried for the Town.

The meeting entered executive session at 2:42 P.M.

Commissioners present: Luther Propst, Natalia Macker, Wes Gardner, and Greg Epstein.

Councilmembers present: Hailey Morton Levinson, Arne Jorgensen, and Jim Rooks.

Others: Chalice Weichman, Deputy Clerk.

On behalf of the County, a motion was made by Commissioner Macker and seconded by Commissioner Epstein to exit executive session. Chair Propst called for a vote. The vote showed all in favor and the motion carried for the County.

The Town exited executive session.

The meeting exited executive session at 2:53 P.M.

V. APPOINTMENTS

On behalf of the County, motion was made by Commissioner Macker and seconded by Commissioner Epstein to re-appoint Ellie Stratton-Brook to the Parks & Recreation Board to serve a full term expiring December 2025, to appoint to the START Board Meghan Quinn to serve the remainder of a term that expires December 2024, and to appoint Matthew Lusins to the Jackson/Teton County Affordable Housing Supply Board to serve a full term expiring December 2025. Chair Propst called for the vote. The vote showed all in favor and the motion carried for the County.

On behalf of the Town, a motion was made by Councilmember Rooks and seconded by Councilmember Jorgensen to re-appoint Ellie Stratton-Brook to the Parks & Recreation Board to serve a full term expiring December 2025, to appoint to the START Board Meghan Quinn to serve the remainder of a term that expires December 2024, and to appoint Matthew Lusins to the Jackson/Teton County Affordable Housing Supply Board to serve a full term expiring December 2025. Mayor Morton Levinson called for the vote. The vote showed all in favor and the motion carried for the Town.

V. MATTERS FROM COMMISSION AND COUNCIL

Adjourn. On behalf of the County, a motion was made by Commissioner Macker and seconded by Commissioner Epstein to adjourn. Chair Propst called for a vote. The vote showed all in favor and the motion carried for the County.

On behalf of the Town, a motion was made by Councilmember Jorgensen and seconded by Councilmember Rooks to adjourn. Mayor Morton Levinson called for a vote. The vote showed all in favor and the motion carried for the Town.

The meeting adjourned at 2:55 P.M.

TETON COUNTY BOARD OF COUNTY COMMISSIONERS

Natalia D. Macker, Chairwoman

ATTEST:

Maureen E. Murphy, County Clerk

TOWN OF JACKSON

Hailey Morton Levinson, Mayor

ATTEST:

Town Clerk



TOWN COUNCIL

BOARD OF COMMISSIONERS

JOINT INFORMATION MEETING

AGENDA DOCUMENTATION

PREPARATION DATE: March 1, 2023

SUBMITTING DEPT: Long-Range Planning

MEETING DATE: March 6, 2023

DEPT. DIRECTORS: Chris Neubecker & Tyler Sinclair

SUBJECT: WSW Consulting Inc. Housing Linkage Policy
Contract Amendment

PRESENTERS: Ryan Hostetter

STATEMENT/PURPOSE

The Teton County Board of County Commissioners ("Board") and Jackson Town Council ("Council") will consider an amended scope and cost for consultant services with WSW Consulting, Inc. (WSW) for the Housing Linkage Policy Analysis project. The amendments will allow the consultants to update critical data, include time for additional meetings, and begin work on the next phase of the nexus study policy and land development regulation development which had been put on hold due to staffing.

BACKGROUND/ALTERNATIVES

On June 7, 2021 a contract was approved between WSW Consulting Inc. and Teton County for completion of the regional housing needs assessment, the employee generation by land use study (i.e. nexus study), and housing strategy planning. To date, the regional housing needs assessment and the nexus study have both been completed. The housing strategy planning scope of work had not begun and was amended during the May 2, 2022 Joint Information Meeting (JIM). During the May 2, 2022 JIM staff recommended that the task become the "mitigation policy discussion with facilitation and draft land development regulations (LDRs)". This change in the scope included a request for additional stakeholder meetings, council and board member interviews, and a two day intensive JIM policy workshop. This scope change was approved during the May 2, 2022 JIM.

During Joint Information Meetings on both May 2, 2022 and on July 6, 2022 the Town Council and Board of County Commissioners received updates on the progress and next steps in the housing needs assessment and nexus study process (staff reports attached). The recommendation from staff at the July 6, 2022 JIM was that the mitigation policy discussion and draft LDRs would be put on hold until Northern South Park was concluded. Staff recommended that the County and Town revisit this scope of work with an anticipated start date of February of 2023.

While staff continues to develop the process and zoning regulations for Northern South Park as well as other ongoing long range projects, staff has begun conversations with the WSW team to move this last piece of the housing work

forward. Staff proposes to begin work on this project now with additional consultant support. Because of this delay, staff also recommended that WSW revisit the scope of work which had been approved during the May 2, 2022 JIM and ensure that the contract includes the necessary resources and time, likely including additional meetings to be facilitated because of the time this effort has been on hold. The contract revision proposes that a contingency be included for use should the Town Council and Board of County Commissioners require additional hearings on the project.

Staff met with WSW on January 25, 2023, to kick off the effort with the consultant team. During the meeting it was evident that the scope should be revised to include meetings to update the former stakeholder group from the needs assessment process, as well as additional scope and cost for updating construction and sales data. An updated cost and scope for the following additions are attached (dated January 31, 2023):

- Technical analysis update for the nexus study with current market figures (\$3,000.)
- Additional stakeholder meeting, increasing from two to three meetings with consultants (\$6,000.)
- Add in-person consultant services to the JIM meeting so that all three consultants are available in-person (\$4,000).
- Contingency for additional meetings, if needed, with all three consultants attending in-person including two additional days for JIM meetings, follow up interviews, and additional work with staff (\$25,000)

COMPREHENSIVE PLAN ALIGNMENT

Comprehensive Plan Policy:

- Maintain a diverse population by providing workforce housing. Principle 5.1
- Reduce the shortage of housing that is affordable to the workforce. Principle 5.3

Housing Action Plan Strategy:

- Require mitigation of employees generated by growth that cannot afford housing. 5C.

STAKEHOLDER ANALYSIS

Stakeholders for the policy work include Town and County taxpayers, local working families, business owners, developers, and visitors. Input has been solicited from the stakeholder group, Housing Supply Board, Jackson Hole Chamber of Commerce, Jackson Hole Working, Shelter JH, and Jackson Hole Conservation Alliance.

FISCAL IMPACT

Teton County does not have the cost for this work included in the approved FY23 budget. A budget amendment will be necessary for the portion of the work to be performed in FY23; separate funds will be requested though the annual budgeting process for funds expected to be paid in FY24.

The Town of Jackson does have the cost for this work included in the approved FY23 budget. Separate funds will be requested though the annual budgeting process for funds expected to be paid in FY24.

It is anticipated that a total of approximately \$70,500 of the total contract amount of \$153,000 would be spent in FY 23 with the remaining amount (including contingency if used) of \$82,500 being used during FY 24 which has not yet been budgeted.

STAFF IMPACT

This project is anticipated within the FY23 Town of Jackson and Teton County Workplan. Principal Long Range Planner Ryan Hostetter will take the lead on this jointly funded project. We anticipate this project will require 300 hours of staff time, evenly split between FY23 and FY24. Staff recommends entering this contract with WSW Consulting, with the goal of clarifying the policy issues in FY23 and adopting updated regulations in FY24.

LEGAL REVIEW

County: A. Moore

Town: Colasuonno

ATTACHMENTS

1. Amended Contract
2. January 31, 2023 WSW Consulting amended scope of work
3. July 6, 2022 JIM staff report with update and timeframe adjustment request (to Feb of 2023)
4. May 2022 JIM staff report for contract amendment
5. Original June 7, 2021 JIM Staff report and contract for the Housing Nexus Study and Housing Needs Assessment

RECOMMENDATION

Staff recommends approval of the attached amended contract and scope of work from WSW Consulting dated January 31, 2023.

SUGGESTED MOTIONS

Town Council: I move to approve the revised scope of work with WSW Consulting for staff and technical support for the housing policy and LDR project and agree to reimburse Teton County for an amount not to exceed \$76,500.

Board of County Commissioners: I move to approve the *Extension and Amendment No. 1 to Agreement for Employee Generation By Land Use Study ("Nexus Study") & Regional Housing Needs Assessment* between Teton County and WSW Consulting for staff and technical support on the housing policy and LDR project in a cost not to exceed \$153,000. The costs for this contract shall be funded through a budget amendment to the FY23 budget in the amount of \$35,250 in FY23.

**EXTENSION AND AMENDMENT NO. 1 TO AGREEMENT FOR EMPLOYEE
GENERATION BY LAND USE STUDY (“NEXUS STUDY”)
& REGIONAL HOUSING NEEDS ASSESSMENT**

This *Extension and Amendment No. 1 to Agreement for Employee Generation By Land Use Study (“Nexus Study”) & Regional Housing Needs Assessment* (“Amendment No. 1”), effective July 1, 2022, is between Teton County, a duly organized county of the State of Wyoming, P.O. Box 1727, Jackson, Wyoming 83001 (“County”) and WSW Consulting, Inc., a California corporation, 1124 Navahoe Drive, South Lake Tahoe, CA 96150 (“Contractor”).

WHEREAS the parties entered into an *Agreement for Employee Generation By Land Use Study (“Nexus Study”) & Regional Housing Needs Assessment*, on or about June 7, 2021 (“Agreement for Services”) with an original expiration date of July 1, 2022; and

WHEREAS, the original Agreement for Services set forth a Scope of Work and Project Budget, not to exceed \$299,760.00 (\$135,000 for the Housing Needs Assessment; \$107,260 for the Housing Nexus Study; \$57,500 for Housing Strategy Planning); and

WHEREAS, the original scope of work for the Housing Needs Assessment has been completed and \$135,000 paid to Contractor; the original scope for work for the Employee Generation by Land Use Study (Nexus Study) was completed and \$107,260 paid to Contractor; and the original Housing Strategy Planning work to be performed by Contractor, originally contracted for \$57,500, was temporarily put on hold at the request of County on May 2, 2022; and

WHEREAS, also on May 2, 2022, during a Joint Information Meeting held with the Jackson Town Council, the County approved a revised scope of work and budget from Contractor, dated April 26, 2022 for \$115,000 that (1) re-directed the unspent \$57,500 in the contract budget towards updating the linkage policy, and (2) approved an additional \$7,500 for detailed housing needs recommendations and \$50,000 for drafting LDR updates; and

WHEREAS, on July 2, 2022, during a Joint Information Meeting held with the Jackson Town Council, the County approved a revised scope of work, budget, and timeline for the work to resume in 2023 from Contractor dated May 26, 2022 for \$115,000 that (1) provided a timeline for when work resumed and (2) ratified the contract changes approved May 2, 2022 totaling \$115,000 with the express understanding that the timeline, scope of work, and budget would all have to be further revised due to the delay when the work resumed; and



1124 Navahoe Dr.
South Lake Tahoe, CA 96150
www.wswconsult.com

To: Ryan Hostetter, AICP, Joint Principal Long Range Planner, Teton County & Town of Jackson

From: Wendy Sullivan, WSW Consulting, Inc.

Subject: Scope of Work Addendum: Linkage Policy Development

Date: January 31, 2023

This memo proposes revisions to the linkage policy development scope dated May 26, 2022, which replaced the original scope of work contracted on June 7, 2021, between WSW Consulting, Inc. and Teton County, WY.

In lieu of the Community Housing Strategy Plan phase, the May 26, 2022 scope proposed to:

- (1) Draft more specific consultant recommendations and next steps for Teton County, WY, to wrap up the Housing Needs Assessment and provide information for potential community housing strategy planning in the future. This was completed in June 2022;
- (2) Work with stakeholders, staff, and elected officials to develop a revised commercial and residential linkage policy, based on the 2022 Commercial and Residential Employee Generation and Affordable Housing Nexus Study and 2022 Teton Region Housing Needs Assessment; and
- (3) Draft Land Development Regulations ("LDR") based on policy decisions.

The May 26, 2022 update stated that we would revisit the scope before proceeding with the work. Based on discussion with the client on January 25, 2023, the following edits are proposed:

- Technical analysis update (nexus study). Add \$3,000.
- Additional stakeholder meeting (for three total meetings). Add \$6,000.
- Additional budget for the proposed JIM meeting to have one principal representative from each of the three consultant firms present. Add \$4,000.
- Build in contingency to be used only if meetings or interviews are needed in addition to those proposed herein. This includes budget for two more days of JIM meetings and follow-up interviews with electeds or stakeholders. Add \$25,000.

These items have been incorporated into the May 26, 2022 scope, below, and are identified separately in the revised budget table.



1124 Navahoe Dr.
South Lake Tahoe, CA 96150
www.wswconsult.com

WSW Consulting, Inc., will continue as Principal in Charge, with Economic and Planning Systems as Technical Advisory, and Logan Simpson for Facilitation and LDR drafting.

The work is proposed to begin mid-February 2023. A full schedule is presented below.

We look forward to the opportunity to assist Teton County and the Town of Jackson with a linkage policy update and are happy to discuss any questions.

Sincerely,

Wendy Sullivan, President
WSW Consulting, Inc.
(303) 579-6702
wendy@wswconsult.com

Revised Scope of Work

The following work components are proposed to:

- (1) Wrap up the Housing Needs Assessment with more specific recommendations for Teton County, WY;
- (2) Work with stakeholders, staff, and elected officials through work sessions and public meetings to develop linkage policy recommendations; and
- (3) Draft LDR based on policy recommendations.

Housing Needs Assessment wrap up – completed June 2022

Specific consultant recommendations and next steps for Teton County, WY, based on the 2022 Housing Needs Assessment research and findings. Recommendations in the March report were kept general with the intention of fleshing out specifics through the Community Housing Strategy Plan phase. Given the shift in scope, more specific, actionable recommendations from the consultant will be provided.

Who: WSW Consulting, Inc.; Williford, LLC; Navigate, LLC

Kickoff - Goal setting

Meeting with the client to frame key policy components, work session content, and project outcomes.

Who: WSW, EPS, Logan Simpson

Technical Analysis Updates (new)

We will conduct updates to some figures applicable to linkage fee levels that have changed since the completion of the Nexus and Needs Assessment studies last summer. The objective is not to completely redo the Nexus analysis, but to incorporate updates that will aid policy decisions. This includes housing prices, wages/ratios to incomes, relevant census data, development costs, and maximum rents for affordable units, but NOT IMPLAN data. The proposed budget assumes that the client and/or stakeholders can provide recent MLS data, updated rents, and development costs for the area.

Nexus stakeholder meetings: three

Three work sessions with the nexus stakeholders to discuss linkage fee levels and primary policy components. Stakeholders will include, at a minimum, participants that were involved during the Nexus study phase. Outcomes of these sessions will be framed as stakeholder recommendations for consensus items and as stakeholder considerations for other policy components. The input from these sessions will help frame the work session discussions with elected officials.

- Meeting 1 (new): to refresh stakeholders on the nexus findings, share updates, and gather input on development costs.
- Meeting 2: review final maximum fee levels and begin the discussion about feasibility and fee levels.
- Meeting 3: refine stakeholder recommendations.

Who: EPS (technical), WSW (policy), Logan Simpson (facilitation)

Elected Official discussions: up to 10

Individual discussions with elected officials regarding linkage policy questions, concerns, and direction or desired policy goals. Outcomes will help frame the discussion for the JIM meetings and highlight where additional information may be needed to facilitate a productive discussion.

Who: Logan Simpson (facilitation/discussion), WSW and EPS (content/question input)

JIM Policy Work Session: two days (in-person)

Two days of linkage policy discussion in a public JIM work session to address primary policy components and facilitate policy direction for the town and county. It is anticipated these sessions will be conducted in-person.

One principal from each firm will be present (3 total) (new - \$4,000 to add one more consultant).

Who: Logan Simpson (facilitation), WSW (policy/framing), EPS (technical)

Linkage Policy LDR Update

Drafting an updated linkage policy LDR based on JIM work session outcomes. This will include drafting the policy and reviewing with staff.

Who: Logan Simpson (LDR drafting, facilitation), WSW and EPS (technical assistance, as needed)

Management Component

We anticipate holding regular weekly meetings with the client to stay apprised of policy development needs. This is in addition to general team and project coordination.

The budgeted component, below, refers to management needs through the JIM sessions. Management for the LDR and continued facilitation phase is incorporated into the budget for that line item.

Deliverables

We propose to provide:

- Recommendations and next steps for the Teton County, WY, Housing Needs Assessment section;
- Presentations and materials created for each of the stakeholder meetings and JIM sessions;
- Revised Nexus Analysis; and,
- Revised LDR linkage policy based on JIM policy decisions.

Town/County Staff Support

Client will assist and support the consultant team with the following tasks:

- Technical Analysis Update. Procuring MLS data, local rent, land value, and development cost updates.
- Coordinating Stakeholder Group Members. To the extent that members of this group need to be confirmed, client will identify and recruit the community members and staff to participate in this group.
- Stakeholder Group/Consultant Communication. Scheduling meetings, forwarding materials, relaying issues that may arise, sending reminders of meetings and presentation schedules, setting up Zoom/video sessions.

- Meeting Support. Organizing and providing the meeting place/venue for in-person meetings, refreshments for participants, public notice when applicable, work session materials (white boards, projectors, etc.) as needed by consultants.
- Media Outreach/Publicity. Press releases, public notice, and other notification as required for this study.

Schedule

We anticipate beginning the Linkage Policy work in mid-February, holding the JIM work session in June, and wrapping up the LDR drafting and ongoing facilitation support phase by the end of September 2023, as follows:

Task	Schedule	Feb				Mar				Apr				May					June				July	Aug	Sept
		Week				1	2	3	4	1	2	3	4	1	2	3	4	5	1	2	3	4	All	All	All
Technical analysis updates	mid-February		x	x																					
Stakeholder #1 - orientation	week of Feb 27				x																				
Stakeholder #2 - policy 1	week of March 20						x																		
Stakeholder #3 - policy 2	week of April 17										x														
Elected interviews	April and May									x	x	x	x	x	x	x									
JIM two-day session	June 5 and 6th																	x							
LDR drafting	mid-June through Sept																		x	x	x	x	x	x	x

Estimated Budget

We propose a not-to-exceed budget of \$153,000 for this scope of work, which includes the \$25,000 contingency. We will only bill for actual time spent. This includes:

- \$7,500 for the Housing Needs Assessment recommendations (completed June 2022);
- \$70,500 for the nexus policy work (beginning February 2023);
- \$25,000 contingency (only if needed); and
- \$50,000 for drafting the LDR.

TASK	Est. Budget
Housing Needs Assessment recommendations - DONE	\$7,500
Linkage policy kickoff meeting	\$2,500
Technical analysis updates (NEW)	\$3,000
Stakeholder meetings (2)	\$13,000
NEW: add third meeting	\$6,000
Elected Official discussions	\$10,000
JIM work session (2 days)	\$18,000
NEW: add third consultant	\$4,000
Management (through JIM work session)	\$14,000
LDR Update and Ongoing Facilitation	\$50,000
Contingency (if needed) (NEW)	\$25,000
TOTAL (excluding contingency)	\$128,000
TOTAL (Including contingency)	\$153,000



JOINT INFORMATION MEETING AGENDA DOCUMENTATION

SUBMITTING DEPARTMENT: Joint Planning

PRESENTER: Tyler Sinclair & Chris Neubecker

MEETING DATE: July 6, 2022

SUBJECT: Housing Nexus Study, Regional Housing Needs Assessment - Contract Amendment

STATEMENT/PURPOSE

The Teton County Board of County Commissioners ("Board") and Jackson Town Council ("Council") will consider amending the scope of work with WSW Consulting ("WSW") concerning the timeline, budget, and deliverables for the housing mitigation policy discussion. Staff proposes that WSW provide a final report from the recently completed Regional Housing Needs Assessment work with staff on suggested next steps, including linkage policy development and drafting Land Development Regulations ("LDRs") based on policy direction, and provide facilitation assistance through the policy adoption. The revised scope of work proposes that Economic and Planning Systems, as well as Logan Simpson, be included as subconsultants. As proposed, some funds previously approved would be reallocated to the Mitigation Policy Discussion & Facilitation and to Housing Linkage LDR Updates.

With this revision, WSW will not be involved going forward in the Community Housing Plan phase.

BACKGROUND/ALTERNATIVES

The Board and Council awarded the Regional Housing Needs Assessment ("HNA") and Housing Nexus Study ("HNS") contract to WSW on June 7, 2021. The HNS evaluates the impacts of new residential and commercial development on the need for affordable workforce housing. The HNS is not policy and does not set the housing mitigation rates for new development.

At the May 2, 2022, Joint Information Meeting, staff presented an amendment to the Housing Nexus Study and Housing Needs Assessment contract. In that meeting, staff recommended an amendment to the contract to obtain specific, actionable recommendations from WSW on the Housing Needs Assessment, and indicated that other members and groups in the community intend to take the lead on a collaborative community resourcing process that will create a community-wide housing plan. At that same meeting, staff also expressed concerns about staffing levels and workload, and advised delaying the housing mitigation policy discussion, facilitation, and LDR updates until after Northern South Park is completed. The Council and Board supported this approach and directed staff to return to a joint meeting with the updated contract and schedule.

Housing Needs Assessment Wrap Up

Instead of moving into the Housing Strategy Planning process this summer, staff recommends requesting a final report from the consultant team that will provide specific, actionable recommendations. This report will be used to inform a future collaborative community resourcing process that will create a community-wide housing plan. Over the summer, staff will collaborate with other stakeholders to help create a community process where the Town/County are participants and not leading the work, funding the work, and also trying to participate in the work. Staff requests that funds previously approved for this task be reallocated to work on the Mitigation Policy Discussion & Facilitation, and to the Housing Linkage LDR Updates.

Phase 1: Mitigation Policy Discussion & Facilitation

Staff recommends working with the consultant team to develop policy recommendations and then draft LDRs based on policy recommendations. The phase 1 portion of this work will include the following:

- Kickoff Meeting and Goal Setting with Staff to frame key policy components, work session content and project outcomes.
- Nexus Stakeholder Meetings (2) – Two work sessions with the nexus stakeholders to discuss linkage fee levels and primary policy components.
- Council and Board Discussions (up to 10) – Individual discussions with elected officials regarding linkage policy questions, concerns, and direction or desired policy goals. Outcomes will help frame the discussion for the JIM meetings and highlight where additional information may be needed to facilitate a productive discussion.
- JIM Policy Workshop (2 days, in person) – Two-day workshop to address primary policy components and facilitate policy direction for Town and County.

Timeline: Begin February 2023 completed by June 2023

Phase 2: Housing Linkage LDR Update

Based on the outcome of Phase 1, Phase 2 will involve drafting updated Land Development Regulations to reflect the desired policy direction. This will include drafting the housing exaction LDR text, reviewing with staff, and facilitating discussions with elected officials in future public meetings to prepare the policy for adoption.

Timeline: Begin July 2023 completed December 2023 (after the Policy Discussion)

COMPREHENSIVE PLAN ALIGNMENT

Comprehensive Plan Policy:

- Maintain a diverse population by providing workforce housing. Principle 5.1.
- Reduce the shortage of housing that is affordable to the workforce. Principle 5.3.

Housing Action Plan Strategy:

- Require mitigation of employees generated by growth that cannot afford housing. 5C.

STAKEHOLDER ANALYSIS

Stakeholders include Town and County taxpayers, local working families, business owners, developers, and visitors. Input has been solicited from the stakeholder group, Housing Supply Board, Jackson Hole Chamber of Commerce, Jackson Hole Working, Shelter JH, and Jackson Hole Conservation Alliance.

FISCAL IMPACT

The approved scope of work for the Housing Needs Assessment and Employee Generation by Land Use was \$299,760. This was included as part of the FY 22 budget. Due to the reduction in scope for the collaborative community resourcing scope, \$57,500 was saved from the original budget and only \$242,260 was spent in FY 22. The original scope of work for the Mitigation Policy Discussion & Facilitation, and the Housing Linkage LDR Updates portion of the original scope was \$57,500. The revised request reallocates the previous funding consistent with the revised scope and increases the total to \$115,000. This represents a net increase from the original budget allocation of \$57,500. Staff will provide needed budget amendments to reflect these changes in the FY 2023 budget.

STAFF IMPACT

This project has required significant staff time from multiple departments across the Town and County. These departments include Town & County Planning, Town Community Development, and Joint Housing.

Town and County legal teams will also be involved in the nexus study portion of the work.

LEGAL REVIEW

K. Gingery and L. Colasuonno

ATTACHMENTS (links)

WSW Consulting, Revised Scope of Work: Linkage Policy Development, May 26, 2022

RECOMMENDATION

Staff recommends moving forward with the scope of work as presented.

SUGGESTED MOTIONS

Town: I move to approve the revised Scope of Work for Linkage Policy Development with WSW Consulting dated May 26, 2022, to complete the Regional Housing Needs Assessment, develop a Residential Linkage Policy, and draft Land Development Regulations for a not to exceed amount of \$115,000, with the Town reimbursing the County for 50% of the total amount.

County: I move to approve the revised Scope of Work for Linkage Policy Development with WSW Consulting dated May 26, 2022, to complete the Regional Housing Needs Assessment, develop a Residential Linkage Policy, and draft Land Development Regulations for a not to exceed amount of \$115,000.



1124 Navahoe Dr.
South Lake Tahoe, CA 96150
www.wswconsult.com

To: Tyler Sinclair, Community Development Director, Town of Jackson
Chris Neubecker, Director of Planning & Building Services, Teton County
April Norton, Director, Jackson/Teton County Affordable Housing Dept.

From: Wendy Sullivan, WSW Consulting, Inc.

Subject: Scope of Work: Linkage Policy Development

Date: May 26, 2022

This memo outlines a requested revision to the original scope of work contracted on June 7, 2021, between WSW Consulting, Inc. and Teton County, WY. In lieu of the Community Housing Strategy Plan phase, the below scope proposes to:

- (1) Draft more specific consultant recommendations and next steps for Teton County, WY, to wrap up the Housing Needs Assessment and provide information for potential community housing strategy planning in the future;
- (2) Work with stakeholders, staff, and elected officials to develop a revised commercial and residential linkage policy, based on the 2022 Commercial and Residential Employee Generation and Affordable Housing Nexus Study and 2022 Teton Region Housing Needs Assessment; and
- (3) Draft Land Development Regulations ("LDR") based on policy decisions.

WSW Consulting, Inc., will continue as Principal in Charge, with Economic and Planning Systems as Technical Advisory, and Logan Simpson for Facilitation and LDR drafting. The nexus policy and LDR work has been requested to begin in February 2023, at which time we will revisit the scope of work and budget for potential changes in light of client needs and project tasks.

We look forward to the opportunity to assist Teton County and the Town of Jackson with a linkage policy update and are happy to discuss any questions or potential revisions to the proposed scope.

Sincerely,

Wendy Sullivan, President
WSW Consulting, Inc.
(303) 579-6702
wendy@wswconsult.com

Revised Scope of Work

The following work components are proposed to:

- (1) Wrap up the Housing Needs Assessment with more specific recommendations for Teton County, WY;
- (2) Work with stakeholders, staff, and elected officials through work sessions and public meetings to develop linkage policy recommendations; and
- (3) Draft LDR based on policy recommendations.

Housing Needs Assessment wrap up

Specific consultant recommendations and next steps for Teton County, WY, based on the 2022 Housing Needs Assessment research and findings. Recommendations in the March report were kept general with the intention of fleshing out specifics through the Community Housing Strategy Plan phase. Given the shift in scope, more specific, actionable recommendations from the consultant will be provided.

Who: WSW Consulting, Inc.; Williford, LLC; Navigate, LLC

Kickoff - Goal setting

Meeting with the client to frame key policy components, work session content, and project outcomes.

Who: WSW, EPS, Logan Simpson

Nexus stakeholder meetings: two

Two work sessions with the nexus stakeholders to discuss linkage fee levels and primary policy components. Stakeholders will include, at a minimum, participants that were involved during the Nexus study phase. Outcomes of these sessions will be framed as stakeholder recommendations for consensus items and as stakeholder considerations for other policy components. The input from these sessions will help frame the work session discussions with elected officials.

Who: EPS (technical), WSW (policy), Logan Simpson (facilitation)

Elected Official discussions: up to 10

Individual discussions with elected officials regarding linkage policy questions, concerns, and direction or desired policy goals. Outcomes will help frame the discussion for the JIM meetings and highlight where additional information may be needed to facilitate a productive discussion.

Who: Logan Simpson (facilitation/discussion), WSW and EPS (content/question input)

JIM Policy Work Session: two days (in-person)

Two days of linkage policy discussion in a public JIM work session to address primary policy components and facilitate policy direction for the town and county. It is anticipated these sessions will be conducted in-person.

Who: Logan Simpson (facilitation), WSW (policy/framing), EPS (technical)

Linkage Policy LDR Update

Drafting an updated linkage policy LDR based on JIM work session outcomes. This will include drafting the policy and reviewing with staff.

Who: Logan Simpson (LDR drafting, facilitation), WSW and EPS (technical assistance, as needed)

Management Component

We anticipate holding regular weekly meetings with the client to stay apprised of policy development needs. This is in addition to general team and project coordination.

The budgeted component, below, refers to management needs through the JIM sessions. Management for the LDR and continued facilitation phase is incorporated into the budget for that line item.

Deliverables

We propose to provide:

- Recommendations and next steps for the Teton County, WY, Housing Needs Assessment section;
- Presentations and materials created for each of the stakeholder meetings and JIM sessions; and
- Revised LDR linkage policy based on JIM policy decisions.

Town/County Staff Support

Client will assist and support the consultant team with the following tasks:

- Coordinating Stakeholder Group Members. To the extent that members of this group need to be confirmed, client will identify and recruit the community members and staff to participate in this group.
- Stakeholder Group/Consultant Communication. Forwarding materials, relaying issues that may arise, sending reminders of meetings and presentation schedules, setting up Zoom/video sessions.
- Meeting Support. Organizing and providing the meeting place/venue for in-person meetings, refreshments for participants, public notice when applicable, work session materials (white boards, projectors, etc.) as needed by consultants.
- Media Outreach/Publicity. Press releases, public notice, and other notification as required for this study.

Schedule

We anticipate beginning this work in May, holding the JIM work shop in August, and wrapping up the LDR drafting and ongoing facilitation support phase by the end of the year (Dec. 2022), as follows:

- Needs Assessment recommendations/next steps: end of May/early June 2022
- Stakeholder meetings: February 2023
- Elected official meetings: March-April 2023
- JIM: May 2023
- Draft policy: May – August 2023

Estimated Budget

We propose a not-to-exceed budget of \$115,000 for this work. We will only bill for actual time spent, not to exceed the budget amount. This includes:

- \$7,500 for the Housing Needs Assessment recommendations (completed June 2022);
- \$57,500 for the nexus policy work (beginning February 2023);
- and \$50,000 for drafting the LDR in 2023.

The nexus policy and LDR work has been requested to begin in February 2023, at which time we will revisit the scope of work and budget for potential changes based on client needs and project tasks before commencing work.

TASK	Est. Budget
Housing Needs Assessment recommendations	\$7,500
Linkage policy kickoff meeting	\$2,500
Stakeholder meetings (2)	\$13,000
Elected Official discussions	\$10,000
JIM work session (2 days)	\$18,000
Management (through JIM work session)	\$14,000
LDR Update and Ongoing Facilitation	\$50,000
TOTAL	\$115,000



JOINT INFORMATION MEETING AGENDA DOCUMENTATION

SUBMITTING DEPARTMENTS: Town Community Development **PRESENTERS:** Tyler Sinclair, April, Norton, Chris
County Planning, Joint Housing Neubecker

MEETING DATE: May 2, 2022

SUBJECT: **Revised Scope and Timeline for Housing Mitigation Program Policy Discussion & Community Housing Plan**

STATEMENT/PURPOSE

The Teton County Board of County Commissioners ("Board") and Jackson Town Council ("Council") will consider revisions to the timeline and deliverables for the Housing Mitigation Policy Discussion and the Community Housing Plan process.

BACKGROUND/ALTERNATIVES

The Board and Council awarded the Regional Housing Needs Assessment and Housing Nexus Study contract to WSW Consulting on June 7, 2021.

The contract had three distinct scopes:

- 1) Regional Housing Needs Assessment - \$135,000 – Complete
- 2) Employee Generation by Land Use Study (Housing Nexus Study) - \$107,260 – Complete with \$12,000 left
- 3) Housing Strategy Planning - \$57,500 – Not started

Total Remaining Budget: \$69,500

The Housing Needs Assessment is a regional study that includes Teton County and Northern Lincoln County, Wyoming and Teton County, Idaho. The Housing Needs Assessment tells us how much and what type of housing we need, for whom housing is needed, and at what price points would be affordable for those in need. It also provides some recommended high level "next steps" for the Teton region collectively and for the individual counties within the region.

The Housing Nexus Study evaluates the impacts of new residential and commercial development on the need for affordable workforce housing. The Housing Nexus Study is not policy and does not set the housing mitigation rates for new development, but it does provide the legal basis for policy makers setting or changing policies on housing mitigation requirements.

The Housing Strategy Planning process proposed to utilize the Housing Needs Assessment and Housing Nexus Study to define a community-driven housing strategy to help address the areas where existing housing options are falling short of supporting local employees and businesses.

Today, staff brings forth a revised scope and timeline for the Board and Council's consideration.

Housing Needs Assessment Wrap Up

Instead of moving into the Housing Strategy Planning process this spring and summer, staff recommends requesting a final report from the consultant team that will provide specific, actionable recommendations. This report will be used to inform a future collaborative community resourcing process that will create a community-wide housing plan. Over the spring and summer, staff will collaborate with other stakeholders to help create a community process where the Town/County are participants but are not leading the work, funding the work, and trying to participate in the work at the same time.

Budget: \$7,500
Timeline: Report delivered by June 1, 2022

Mitigation Policy Discussion, Facilitation, & LDR Update

Staff recommends working with the consultant team to develop policy recommendations and then draft Land Development Regulations based on policy recommendations. Bruce Meighen, with Logan Simpson Design, who has worked in the community previously on Housing, and Comprehensive Plan projects will lead this effort. This work will include the following:

- Kickoff Meeting with Staff to frame key policy components, work session content and project outcomes
- Nexus Stakeholder Meetings (2) – Two work sessions with the nexus stakeholders to discuss linkage fee levels and primary policy components.
- Council and Board Discussions (up to 10) – Individual discussions with elected officials regarding linkage policy questions, concerns, and direction or desired policy goals. Outcomes will help frame the discussion for the Joint Information Meetings (JIM) and highlight where additional information may be needed to facilitate a productive discussion.
- JIM Policy Workshop (2 days, in person) – Two-day workshop to address primary policy components and facilitate policy direction for Town and County.
- Housing Nexus Policy LDR Update
- Housing LDR Text Amendments Public Hearings - Town and County Planning Commissions, Town Council and Board of County Commissioners.

Budget: \$107,500
Staff notes that the amount of work required to amend the LDRs will not be known until after policy direction is provided. Staff and the consultant have provided this “not to exceed” estimate in the proposed scope of work; should the actual cost exceed this amount; the Town and County would need to approve a further revision to the contract.

Timeline: Policy discussion and recommendations – June to August
Mitigation Policy Recommendation from Council and Board – August Joint Information Meeting
LDR drafting – August to December
Staff notes that it will be important to stay on schedule to ensure this project can be completed prior to December 31, 2022, with this group of elected officials.

COMPREHENSIVE PLAN ALIGNMENT

Comprehensive Plan Policy:

- Maintain a diverse population by providing workforce housing. Principle 5.1.
- Reduce the shortage of housing that is affordable to the workforce. Principle 5.3.

STAKEHOLDER ANALYSIS

A stakeholder group of seven individuals participated as part of the Housing Nexus Study work. They met five times to review the methodology and results and provided feedback to the consultant team. The group included: Anna Olson, Mekki Jaidi, Rob DesLauries, Tyler Davis, Josh Haney, Skye Schell, and Gavin Fine.

FISCAL IMPACT

The current contract has \$69,500 of budget remaining. The revised contract is for \$115,000, representing an increase of \$45,500. This would be split evenly between the Town and County. The Town and County currently have \$50,000.00 (\$25,000 each) in their FY 2023 proposed Professional Services budget to complete this work.

STAFF IMPACT

This project has required significant staff time from multiple departments across the Town and County. These departments include Town & County Planning, Town Community Development, and Joint Affordable Housing. Staff's work on this project will impact the timing of other Long-Range Planning priorities recently determined through the Annual Work Plan, including Northern South Park zoning and LDR development in the County, and Bear Conflict Standards and Wildlife Feeding regulations in the Town. If the Board and Council find this project to be a priority over other projects, staff requests direction of which other projects or tasks can be delayed.

LEGAL REVIEW

K. Gingery

ATTACHMENTS

Scope of Work: Linkage Policy Development, April 25, 2022

RECOMMENDATION

Staff does not have a recommendation. The decision to allocate budget and staff resources is the discretion of the Board and Council.

MOTION

Town

I move to approve the revised WSW Consulting, Scope of Work: Linkage Policy Development, dated April 25, 2022, and agree to reimburse the County for half of the additional project cost not to exceed \$22,750.00.

County

I move to direct staff to revise the contract and associated scope of work with WSW Consulting as described in the WSW Consulting, Scope of Work: Linkage Policy Development, dated April 25, 2022.



1124 Navahoe Dr.
South Lake Tahoe, CA 96150
www.wswconsult.com

To: Tyler Sinclair, Community Development Director, Town of Jackson
Chris Neubecker, Director of Planning & Building Services, Teton County
April Norton, Director, Jackson/Teton County Affordable Housing Dept.

From: Wendy Sullivan, WSW Consulting, Inc.

Subject: Scope of Work: Linkage Policy Development

Date: April 26, 2022

This memo outlines a requested revision to the original scope of work contracted on June 7, 2021, between WSW Consulting, Inc. and Teton County, WY. In lieu of the Community Housing Strategy Plan phase, the below scope proposes to:

- (1) Draft more specific consultant recommendations and next steps for Teton County, WY, to wrap up the Housing Needs Assessment and provide information for potential community housing strategy planning in the future;
- (2) Work with stakeholders, staff, and elected officials to develop a revised commercial and residential linkage policy, based on the 2022 Commercial and Residential Employee Generation and Affordable Housing Nexus Study and 2022 Teton Region Housing Needs Assessment; and
- (3) Draft Land Development Regulations ("LDR") based on policy decisions.

WSW Consulting, Inc., will continue as Principal in Charge, with Economic and Planning Systems as Technical Advisory, and Logan Simpson for Facilitation and LDR drafting.

We look forward to the opportunity to assist Teton County and the Town of Jackson with a linkage policy update and are happy to discuss any questions or potential revisions to the proposed scope.

Sincerely,

Wendy Sullivan, President
WSW Consulting, Inc.
(303) 579-6702
wendy@wswconsult.com

Revised Scope of Work

The following work components are proposed to:

- (1) Wrap up the Housing Needs Assessment with more specific recommendations for Teton County, WY;
- (2) Work with stakeholders, staff, and elected officials through work sessions and public meetings to develop linkage policy recommendations; and
- (3) Draft LDR based on policy recommendations.

Housing Needs Assessment wrap up

Specific consultant recommendations and next steps for Teton County, WY, based on the 2022 Housing Needs Assessment research and findings. Recommendations in the March report were kept general with the intention of fleshing out specifics through the Community Housing Strategy Plan phase. Given the shift in scope, more specific, actionable recommendations from the consultant will be provided.

Who: WSW Consulting, Inc.; Williford, LLC; Navigate, LLC

Kickoff - Goal setting

Meeting with the client to frame key policy components, work session content, and project outcomes.

Who: WSW, EPS, Logan Simpson

Nexus stakeholder meetings: two

Two work sessions with the nexus stakeholders to discuss linkage fee levels and primary policy components. Stakeholders will include, at a minimum, participants that were involved during the Nexus study phase. Outcomes of these sessions will be framed as stakeholder recommendations for consensus items and as stakeholder considerations for other policy components. The input from these sessions will help frame the work session discussions with elected officials.

Who: EPS (technical), WSW (policy), Logan Simpson (facilitation)

Elected Official discussions: up to 10

Individual discussions with elected officials regarding linkage policy questions, concerns, and direction or desired policy goals. Outcomes will help frame the discussion for the JIM meetings and highlight where additional information may be needed to facilitate a productive discussion.

Who: Logan Simpson (facilitation/discussion), WSW and EPS (content/question input)

JIM Policy Work Session: two days (in-person)

Two days of linkage policy discussion in a public JIM work session to address primary policy components and facilitate policy direction for the town and county. It is anticipated these sessions will be conducted in-person.

Who: Logan Simpson (facilitation), WSW (policy/framing), EPS (technical)

Linkage Policy LDR Update

Drafting an updated linkage policy LDR based on JIM work session outcomes. This will include drafting the policy and reviewing with staff.

Who: Logan Simpson (LDR drafting, facilitation), WSW and EPS (technical assistance, as needed)

Management Component

We anticipate holding regular weekly meetings with the client to stay apprised of policy development needs. This is in addition to general team and project coordination.

The budgeted component, below, refers to management needs through the JIM sessions. Management for the LDR and continued facilitation phase is incorporated into the budget for that line item.

Deliverables

We propose to provide:

- Recommendations and next steps for the Teton County, WY, Housing Needs Assessment section;
- Presentations and materials created for each of the stakeholder meetings and JIM sessions; and
- Revised LDR linkage policy based on JIM policy decisions.

Town/County Staff Support

Client will assist and support the consultant team with the following tasks:

- Coordinating Stakeholder Group Members. To the extent that members of this group need to be confirmed, client will identify and recruit the community members and staff to participate in this group.
- Stakeholder Group/Consultant Communication. Forwarding materials, relaying issues that may arise, sending reminders of meetings and presentation schedules, setting up Zoom/video sessions.
- Meeting Support. Organizing and providing the meeting place/venue for in-person meetings, refreshments for participants, public notice when applicable, work session materials (white boards, projectors, etc.) as needed by consultants.
- Media Outreach/Publicity. Press releases, public notice, and other notification as required for this study.

Schedule

We anticipate beginning this work in May, holding the JIM work shop in August, and wrapping up the LDR drafting and ongoing facilitation support phase by the end of the year (Dec. 2022), as follows:

- Needs Assessment recommendations/next steps: end of May
- Stakeholder meetings: June
- Elected official meetings: June-July
- JIM: August
- Draft policy: August - December

Estimated Budget

We propose a not-to-exceed budget of \$115,000 for this work. We will only bill for actual time spent, not to exceed the budget amount. This includes \$65,000 for the work through the August JIM and \$50,000 for drafting the LDR.

TASK	Est. Budget
Housing Needs Assessment recommendations	\$7,500
Linkage policy kickoff meeting	\$2,500
Stakeholder meetings (2)	\$13,000
Elected Official discussions	\$10,000
JIM work session (2 days)	\$18,000
Management (through JIM work session)	\$14,000
LDR Update and Ongoing Facilitation	\$50,000
TOTAL	\$115,000



JOINT INFORMATION MEETING AGENDA DOCUMENTATION

SUBMITTING DEPARTMENT: Joint Housing

PRESENTER: Tyler Sinclair & Chris Neubecker

MEETING DATE: June 7, 2021

SUBJECT: Housing Nexus Study, Regional Housing Needs Assessment Contract Award

STATEMENT/PURPOSE

The Teton County Board of County Commissioners ("Board") and Jackson Town Council ("Council") will consider awarding the contract for services for a Housing Nexus Study and Regional Housing Needs Assessment. Once complete, these studies will provide 1) the legal nexus for the housing mitigation program and 2) the current and future workforce housing needs for the region (Teton County, Wyoming; Teton County, Idaho; and Northern Lincoln County, WY).

BACKGROUND/ALTERNATIVES

On January 28, 2020, the Board and Council approved an RFQ for a consultant to conduct a new Housing Nexus Study ([staff report here](#)). The purpose of this study is to update the 2013 Housing Nexus Study and provide accurate data about employee generation in Teton County. As discussed at prior Joint Information Meetings, this study will not mandate specific mitigation rates. Instead, it will provide data about the number of employees generated by new business and residential development, total employment rates by job sector, and outline the maximum, legally defensible limits of any mitigation program.

Following staff recommendation, a technical stakeholder group was formed to provide comments and consultation to inform staff's recommendations throughout the Nexus Study. The RFQ was released January 29, 2020 and three entities responded: Raftelis, Clarion Associates, and Place Dynamics.

The Housing Nexus Study was presented to the Board and Council on May 4, 2020 ([staff report here](#)). At that time, the Board and Council continued the item considering the COVID-19 pandemic and its unknown effects on each entity's budget.

On November 2, 2020, the Board and Council directed staff to bring the item back at a future meeting. In the interim the Board and Council have both approved a reduction in housing mitigation fees.

On February 1, 2021 ([staff report here](#)), the Board and Council discussed options for moving the Housing Nexus Study forward. At this meeting, the Board and Council directed staff to include a regional housing needs assessment component to the scope for the RFQ. The needs assessment will provide information about how much and what types of housing are needed today and will be needed for the next several years to meet the community's housing goals and will also provide this information for our "commuter-shed" communities: Teton County, Idaho and Northern Lincoln County, Wyoming.

On March 1, 2021 ([staff report here](#)), the Board and Council approved the RFQ for the Housing Nexus Study and Regional Housing Needs Assessment. The RFQ was released March 2, 2021 and three responses to the RFQ were received by the deadline, April 2, 2021.

On May 3, 2021 ([staff report here](#)), the Board and Council directed staff to work with WSW Consulting to refine the scope of work and budget, including further defining the role of OPS Strategies, adding elected official work sessions and a final plan and presentation, and defining the financial commitment of Teton County, ID and Lincoln County, WY.

Today, staff is providing the Board and Council with a final scope of work and budget broken out into three components: 1) Regional Housing Needs Assessment, 2) Employee Generation by Land Use Study, and 3) Housing Strategy Planning.

- Regional Housing Needs Assessment.
 - o \$135,000
 - o Teton County, Idaho will contribute 15% of the overall cost for this work.
 - o OPS Strategies will account for 10% of the work hours for this portion of the scope of work.
 - o One addition to this scope of work: create a stakeholder group for Teton County, Idaho who will work with the Teton County, Wyoming stakeholder group.
- Employee Generation by Land Use Study (Nexus Study)
 - o \$107,260
 - o OPS Strategies will not work on this portion of the scope of work.
 - o One addition to this scope of work: expand the evaluation of tourism impacts to also include the evaluation of second home and remote worker impacts.
- Housing Strategy Planning
 - o \$57,500
 - o OPS Strategies will contribute 5% of the work hours for this portion of the scope of work.
 - o One addition to this scope of work: add one more elected official meeting to discuss the findings and strategy options.
 - o One subtraction to this scope of work: remove the public open house in Teton County, Idaho.

COMPREHENSIVE PLAN ALIGNMENT

Comprehensive Plan Policy:

- Maintain a diverse population by providing workforce housing. Principle 5.1.
- Reduce the shortage of housing that is affordable to the workforce. Principle 5.3.

Housing Action Plan Strategy:

- Require mitigation of employees generated by growth that cannot afford housing. 5C.

STAKEHOLDER ANALYSIS

Stakeholders include Town and County taxpayers, local working families, business owners, developers, and visitors. Input has been solicited from the stakeholder group, Housing Supply Board, Jackson Hole Chamber of Commerce, Jackson Hole Working, Shelter JH, and Jackson Hole Conservation Alliance.

FISCAL IMPACT

The proposed not to exceed amount based on the scope of work is \$299,760.

A FY22 request for \$250,000 for this work is part of the current budget request the Council and Board are considering. Additionally, the Board approved \$50,000 for this work as part of a FY21 budget amendment.

STAFF IMPACT

This project will require significant staff time from multiple departments across the Town and County. These departments include: Town & County Planning, Town Community Development, and Joint Housing. These same departments are also working on the Northern South Park neighborhood plan project, along with their many and various department-led projects (ie: current & long-range planning, housing capital projects and programs). Town and County legal teams will also be involved in the nexus study portion of the work.

LEGAL REVIEW

K. Gingery and L. Colasuonno

ATTACHMENTS

- Contract for Services with WSW Consulting

RECOMMENDATION

Staff recommends moving forward with the scope of work as presented today.

SUGGESTED MOTIONS

Town: I move to recommend approval by the Teton County Board of County Commissioners of a contract for services with WSW Consulting to complete the Regional Housing Needs Assessment and Employee Generation by Land Use Study for a not to exceed amount of \$299,760.

County: I move to approve the Contract for Services with WSW Consulting to complete the Regional Housing Needs Assessment and Employee Generation by Land Use Study for a not to exceed amount of \$299,760.

AGREEMENT FOR EMPLOYEE GENERATION BY LAND USE STUDY (“NEXUS STUDY”) & A REGIONAL HOUSING NEEDS ASSESSMENT

This Agreement for Services (“Agreement”) is entered into this ____ day of June 2021, (hereinafter referred to as the effective date of the Agreement) by and between Teton County, a duly organized county of the State of Wyoming, P.O. Box 1727, Jackson, Wyoming 83001 (“County”) and WSW Consulting, Inc., a California corporation, 1124 Navahoe Drive, South Lake Tahoe, CA 96150 (“Contractor”).

Witnesseth

WHEREAS the Jackson/Teton County Housing Authority is a Regional Housing Authority jointly funded by both the Town of Jackson, Wyoming and Teton County, Wyoming; and

WHEREAS the Jackson/Teton County Housing Department is a joint department of Town of Jackson and Teton County that is operated on a day-to-day basis by Teton County; and

WHEREAS the Town of Jackson and Teton County are committed to increasing the supply of stable, affordable housing for the local workforce to meet community goals related to Quality of Life, Ecosystem Stewardship, and Growth Management as set forth in the joint Jackson/Teton County Comprehensive Plan; and

WHEREAS Teton County and the Town of Jackson issued a Request For Qualifications (RFQ) for a consultant qualified to prepare (1) an Employee Generation By Land Use Study (“Nexus Study”) and (2) a Regional Housing Needs Assessment; and

WHEREAS in response to the RFQ, Contractor submitted their qualifications and a proposal to provide the requested services dated April 2, 2021; and

WHEREAS Contractor was selected by the Town of Jackson and Teton County to provide the desired services; and

WHEREAS the Town of Jackson and Teton County have determined that Teton County shall enter into a contract for the services with Contractor; and

WHEREAS the County desires to hire Contractor and Contractor desires to provide the services outlined in the RFQ as well as certain additional services that were discussed during the proposal review period, which the Town of Jackson and Teton County determined would be added to the consultant’s scope of work; and

WHEREAS Contractor and their team have the necessary qualifications, skill, and experience to provide the services requested in the RFQ and the additional services; and

WHEREAS the County and Contractor have agreed upon the final scope of work and a project budget for the services to be provided, which is set forth in a revised final proposal prepared by Contractor; and

NOW THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree to the terms and conditions set forth herein.

Article 1. Statement of Work

Contractor shall provide professional services to the County for (1) an Employee Generation By Land Use Study ("Nexus Study") and (2) a Regional Housing Needs Assessment ("Project") as more fully described in the Scope of Work set forth in Contractor's revised final proposal that is attached hereto as **Exhibit A**.

Article 2. Timetable

Contractor shall complete the professional services for the Project by July 1, 2022. Contractor shall be paid for the work performed up to the point of termination.

Article 3. Compensation and Payment

The County agrees to pay Contractor as full compensation for all services provided for the Project, a fee not to exceed **Two Hundred Ninety-Nine Thousand Seven Hundred Sixty Dollars (\$299,760.00)** in accordance with the Project Budget found in Contractor's revised final proposal attached as Exhibit A. It is specifically understood and agreed to by Contractor, that the amount listed is a "not to exceed" amount. Contractor shall not receive compensation in excess of the total "not to exceed" amount as set forth in this Article without the prior written approval of the Teton County Board of County Commissioners. The amount of permissible compensation is more fully described in the Project Budget.

The amount of compensation shall not vary as a result of the time of day the services are performed or the number of hours during which services are performed in any given period of time. The County may examine all records of Contractor during reasonable hours for a period up to and including one (1) year after termination of this contract in order to audit and verify the aforesaid charges.

Contractor shall present an appropriate voucher to the Clerk of Teton County upon the delivery of each Project component, task, and/or deliverable which are fully defined within the Scope of Work and the Project Budget.

Article 4. Term and Termination Without Cause

The terms of this Agreement shall commence on the effective date of this Agreement and shall expire July 1, 2022. Contractor or County may terminate this agreement at any time with or without cause by giving thirty (30) days written notice to the other its intent to terminate this Agreement; provided, however, that all compensation earned or costs incurred prior to such termination shall be payable to Contractor. The provisions of Article 8 shall survive termination or expiration hereof.

Article 5. Place of Performance

Contractor shall be responsible for maintaining its own office facilities and will not be provided with either office facilities or secretarial support by the County. The Contractor shall supply at its own expense, all materials, supplies, equipment, and tools required to accomplish the work that is agreed to be performed in accordance with this Agreement.

Article 6. Independent Contractor Status

It is understood and agreed the Contractor will provide the services under this Agreement on a professional basis and as an independent contractor and that during the performance of the services under this Agreement, Contractor's employees will not be considered employees of the County within the meaning or the applications of any federal, state, or local laws or regulations including, but not limited to, laws or regulations covering unemployment insurance, old age benefits, worker's compensation, industrial accident, labor, or taxes of any kind. Contractor's employees shall not be entitled to benefits that may be afforded from time to time to County employees, including without limitation, vacation, holidays, sick leave, worker's compensation and unemployment insurance. Further, the County shall not be responsible for any such withholding or paying of taxes or social security.

Article 7. Trademark and Trade Name

This Agreement does not give either Party any ownership rights or interest in the other Party's trade name or trademarks.

Article 8. General Provisions

A. Entire Agreement

This Agreement represents the entire and sole agreement between the Parties with respect to the subject matter hereof and supersedes any and all prior negotiations, understanding, representation, or consulting agreements whether written or oral. This Agreement cannot be modified, changed, or amended, except in writing signed by the Parties.

B. Waiver

The failure of either Party to require performance by the other of any provision hereof shall in no way affect the right to require performance at any time thereafter, nor shall the waiver of a breach of any provision hereof be taken to be a waiver of any succeeding breach of such provision or as a waiver of the provision itself. All remedies afforded in this Agreement shall be taken and construed as cumulative; that is, in addition to every other remedy available at law or in equity.

C. Relationship

Nothing herein contained shall be construed to imply a joint venture, partnership, or principal-agent relationship between Contractor and the County; and neither Party shall have the right, power, or authority to obligate or bind the other in any manner whatsoever, except as otherwise agreed in writing.

D. Assignment and Delegation

Neither Party shall assign or delegate this Agreement or any rights, duties, or obligations hereunder without the express written consent of the other. Subject to the foregoing, this Agreement shall inure to the benefit of and be binding upon the successors, legal representatives, and assignees of the Parties hereto.

E. Severability

If any provision of this Agreement is declared invalid or unenforceable, such provision shall be deemed modified to the extent necessary and possible to render it valid and enforceable. In any event, the unenforceability or invalidity of any provision shall not affect any other provision of this Agreement, and this Agreement shall continue in force and effect, and be construed and enforced, as if such provision had not been included, or had been modified as provided above, as the case may be.

F. Governing Law

This Agreement shall be governed by, and construed in accordance with, the laws of the State of Wyoming, without giving effect to the principles of conflict of laws thereof. The Parties hereto irrevocably elect as the sole judicial forum for the adjudication of any matters arising under or in connection with this Agreement, and consent to the jurisdiction of, the courts of the County of Teton, State of Wyoming, or the United States of America for the District of Wyoming. This Agreement was negotiated by both Parties hereto. As such, this Agreement shall not be construed against or in favor of any Party by virtue of which party drafted the Agreement or any portion thereof.

G. Dispute Resolution

In the event of a dispute arising under the terms of this Agreement the Parties shall, prior to resort to the Courts, enter into good faith efforts to mediate their differences. The Parties shall jointly select a disinterested third party to act as a mediator to facilitate the resolution of their dispute. In the event the Parties are unable to jointly decide on a mediator, they shall each select an impartial representative, the two of whom shall decide on the mediator. The mediator shall, within ninety (90) days, conduct a hearing on the matter, and submit his or her findings and conclusions to the Parties. The provisions of W.S. §§ 1-43-101 through 1-43-104 shall apply to the mediation process. Each of the Parties shall share equally in the cost of the mediator but shall otherwise each bear their own costs in the mediation process.

H. Paragraph Headings

The paragraph headings set forth in this Agreement are for the convenience of the Parties, and in no way define, limit, or describe the scope or intent of the Agreement and are to be given no legal effect.

I. Indemnity

Contractor agrees to indemnify and hold County, their officers, agent and employees harmless from any and all claims, damages, costs, liability or expenses (including attorney's fees) arising out of the performance of the Scope of Work as set forth in this Agreement.

J. Declaration by Independent Contractor

The Contractor declares and states that it has complied with all federal, state, and local laws regarding business permits and licenses that may be required to carry out the work to be performed under this agreement.

K. Third Party Beneficiary

The Parties do not intend to create in any other individual or entity the status of third-party beneficiary, and this Agreement shall not be construed so as to create such.

L. Sovereign Immunity

County does not waive their sovereign immunity by entering into this Agreement, and fully retain all immunities and defenses provided by law with respect to any action based on or arising out of this Agreement.

M. Ethics and Standards

Consultant shall conform to all federal, state, local and applicable laws and regulations, and to the highest business ethics in performing its obligations in accordance with the terms of this Agreement.

N. Counterparts

This Agreement may be executed in counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

Article 9. Notice

For purposes of this Agreement, any notice shall be deemed properly sent and received when sent by certified mail with return receipt requested to the parties at the following addresses until or unless changed by one Party giving written notice of such change of address to the other Party:

County

Jackson/Teton County Housing Department
ATTN: April Norton
P.O. Box 1727
Jackson, WY 83001

Contractor

WSW Consulting, Inc.
ATTN: Wendy Sullivan
1124 Navahoe Drive
South Lake Tahoe, CA 96150

IN WITNESS WHEREOF the Parties have executed this Agreement.

Teton County, WY

WSW Consulting, Inc.

Natalia D. Macker Date
Chairwoman
Teton County Board of County Commissioners

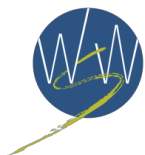
Wendy Sullivan Date
President
WSW Consulting, Inc.

Attest:

Maureen Murphy, Date
Teton County Clerk

Teton County, Wyoming & The Town of Jackson, Wyoming RFQ Submission

April 2021



**Regional Housing Needs
Assessment**



**Employee Generation by Land
Use Study**

Principal in Charge

Wendy Sullivan, WSW Consulting
San Anselmo, CA
wendy@wswconsult.com

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Qualifications

Proposed Project Team

We are a well-seasoned team, known for our high quality analysis and effective strategies. The primary managing firms included in this proposal are leaders in their field: WSW Consulting, Inc., which specializes in housing needs assessments and action strategy plans for high-amenity, mountain resort communities; and Economic and Planning Systems, which excels in housing nexus and linkage studies for a range of communities, including mountain resort areas.

WSW Consulting, Inc., Principal in Charge

Wendy Sullivan (WSW Consulting, Inc.) is the Principal in Charge for this project and will be the primary point of contact to coordinate the activities of both the Housing Needs Assessment and Employee Generation study teams.

WSW Consulting helps housing organizations, communities and counties identify and provide the workforce housing necessary to support and sustain rural and resort communities and economies. Housing your workforce is more than just building homes that they can afford. If done right, it can help invigorate a community, support local businesses, allow families to thrive, and further community economic goals.

WSW brings over 20 years of experience working on housing issues in high-cost resort and rural communities. We have an intimate knowledge of the challenges faced by these communities and the changing face of those challenges over time. We understand that a one-size-fits-all approach to data analysis and housing strategy development has no place in rural and resort communities and tailor our research and approach according to the unique situation and needs of each community. As a result, our results are not only on-point and defensible, but usable and implementable to achieve your community goals.

WSW brings strong data analysis, market research, housing strategy, and legal skills to every project, along with a strong network of workforce housing experts that we frequently partner with to devise a team to best meet the needs of each client and project. Because we work together so often, our firms function as one company in the experience of our clients. The core Housing Needs Assessment team for this study is summarized below.

Economic & Planning Systems (EPS)

EPS is a land economics consulting firm experienced in the full spectrum of services related to real estate development, economic and market analysis, public/private partnerships, and the financing of government services and public infrastructure. Since 1983, EPS has provided consulting services to hundreds of public and private sector clients in throughout the United States. Clients include cities, counties, special districts, multi-jurisdictional authorities, property

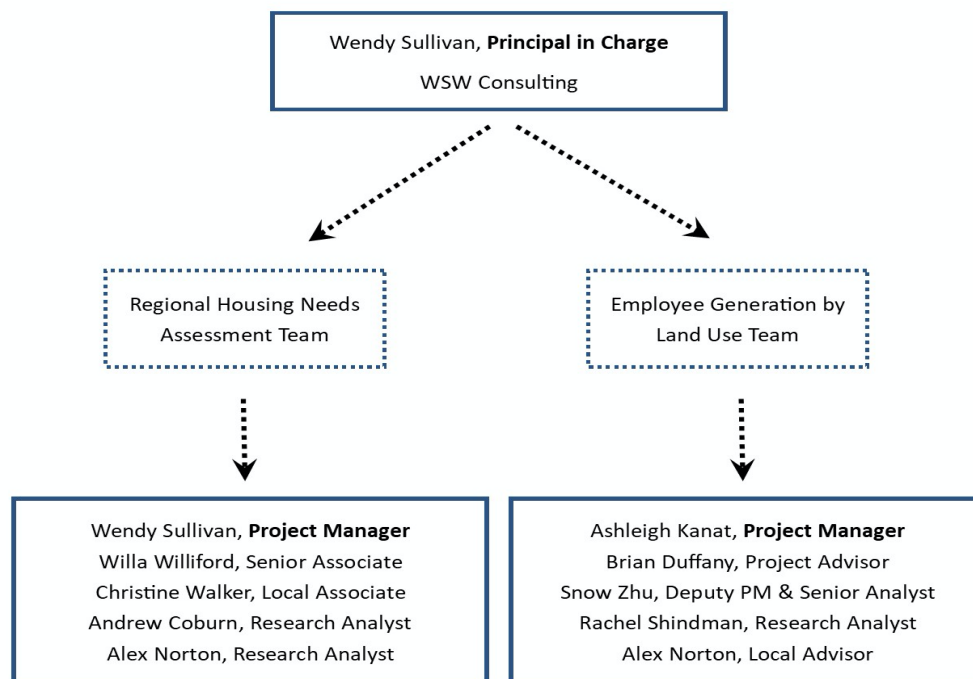
owners, developers, financial institutions, and land use attorneys. EPS applies a multi-disciplinary approach to our work, engaging policy issues against the backdrop of fiscal, economic, land use, and public finance opportunities and constraints.

Among other areas of expertise, EPS provides a variety of services related to the formulation of affordable housing policies and programs. These include inclusionary housing ordinances and in-lieu fees, nexus studies to support affordable housing impact fees on residential and nonresidential development, feasibility analyses and program design for specific development projects' incorporation of affordable units, and comprehensive housing strategies and policies leveraging a wide variety of funding and regulatory mechanisms. EPS understands that affordable housing requirements on new development represent a constraint as well as an opportunity, and seek to craft viable balanced solutions that represent equitable and sustainable solutions to communities' affordable housing needs.

For this project, EPS has assembled a team of highly qualified individuals from our Denver and Oakland offices with the impact fee and mountain resort community experience necessary to successfully complete this project in collaboration with the Housing Needs Assessment. As a relatively small firm (about 50 employees in four offices), EPS's policy is to bring the most relevant in-house talent to each assignment so that our clients are provided the highest level of service. The core Employee Generation Study Team for this study is summarized below.

Project Team Organizational Chart

The complete team is illustrated in the following organizational chart. Team member contact information, roles in this project, description and overall experience is provided in more detail below the chart. Resumes for each team member are provided in the Appendix.



Core Regional Housing Needs Assessment Team

Wendy Sullivan Project Manager WSW Consulting 1124 Navahoe Dr. S. Lake Tahoe, CA 96150 (303) 579-6702 wendy@wswconsult.com	Willa Williford Senior Associate Williford LLC PO Box 941 Crested Butte, CO 81224 (303) 818-0096 willa@willifordhousing.com
Wendy will manage the housing needs assessment process, conduct interviews, survey drafting/management, report drafting and analysis, recommendations and strategies.	Willa's strength in housing strategy development and implementation will support: management assistance, housing strategy/program review, interviews, report drafting, recommendations and strategies.
Christine Walker Local Associate Navigate, LLC 152 E. Gill Jackson Hole, WY 83001 (307) 690-4487 christine@navigatejh.com	Andrew Coburn Research Analyst Urban Rural Continuum LLC PO Box 452 Ridgway, CO 81432 (720) 464-5821 andrew@urbanruralcontinuum.com
Christine's local knowledge, housing program and development experience will support: local data/resources, survey outreach coordination, report analysis, strategies.	Andrew's analytical strength will support: data collection, interviews, analysis, quality control, report drafting.
Alex Norton Research Analyst OPS Strategies PO Box 1349 Jackson Hole, WY 83001 (307) 690-9892 alex@opsstrategies.com	
Support scommuting and job patterns data analysis, local contacts for outreach/data needs.	

WSW Consulting

Wendy Sullivan, principal of WSW Consulting, is a housing planner and attorney, licensed in Colorado and California, specializing in affordable housing market research and strategy. She has over 20 years of community planning experience in both the public and private sector. Wendy has conducted and managed housing needs assessments, market studies and housing policy development for a range of communities, with particular focus on high-cost resort communities. Her work has helped towns like Breckenridge, CO, and Mammoth Lakes, CA, inform and maintain successful affordable and workforce housing policies and programs. She

previously worked as a planner for Blaine County, Idaho (home of Sun Valley ski resort), as a senior housing analyst for RRC Associates, Inc., in Boulder, Colorado, and as a contract attorney in municipal and affordable housing law. Wendy has a J.D. from the University of Colorado in Boulder, a Master's in Regional Planning and a Bachelor's degree in computer science and minor in math.

Williford LLC

Willa Williford brings 15 years of experience in affordable housing, community planning and investment. Willa's professional experience includes housing development, finance, and operations. Prior to forming her own company, she served as Deputy Director for the Boulder County Housing Authority (BCHA), where she was responsible for numerous strategic housing goals including growing the inventory of affordable housing by 500 units, purchasing land for future development, disposing of non-performing assets, and cultivating sustainable program revenue sources. Willa understands that high quality housing is fundamental to the physical and social fabric of communities and she is versed in the tools necessary to achieve community housing goals. Willa has a Master's degree in Regional Planning from University of Colorado at Denver and undergraduate degree in political science.

Navigate, LLC

Christine Walker is a real estate development consultant specializing in creating homes in high amenity, resort communities that local residents can afford to purchase or rent. She brings over 20 years of experience in affordable housing, community development, and hands-on experience to addressing workforce housing needs. As the former Executive Director of the Teton County Housing Authority (TCHA), Christine facilitated the development of and managed hundreds of homes for the Jackson Hole workforce. She understands the nuances of public policy and housing programs, how to structure programs and management to maintain affordability and quality of units over time, how policies and programs can assist or stifle development of affordable housing in high-cost resort communities and how to navigate various program, funding and partnership opportunities to meet affordable housing needs.

Urban Rural Continuum, LLC

Andrew Coburn, principal of Urban Rural Continuum LLC, is a planner located in Ridgway, CO (near Telluride). He excels at economic, demographic and housing market research and has assisted members of this team with housing needs assessments in Colorado rural and mountain resort communities. Prior to founding Urban Rural Continuum LLC, Mr. Coburn served as a project manager and community planner for the National Park Service. Mr. Coburn holds a Master of Urban and Regional Planning and a Master of Public Administration from the University of Colorado at Denver. He also holds undergraduate degrees in economics and business administration from the University of Montana and is currently completing the London School of Economics Real Estate Economics and Finance online certificate.

OPS Strategies, LLC

Founding Principal, Alex Norton, AICP, assists communities, organizations, and landowners throughout the Rocky Mountain west with strategic organization, planning, and study. Located in Jackson, Wyoming, Alex has worked with counties, towns, school districts, non-profits, and landowners to identify strategic solutions that fit community values, trends, and needs. Alex, brings award-winning experience in comprehensive planning and public engagement as well as years of experience in affordable housing, trend analysis, growth management, and conservation development. His track record in Teton County, WY, includes the current workforce housing requirements and incentives, Jackson/Teton County Housing Action Plan, and employee generation nexus study. Alex provided research and policy analysis for other WSW Consulting projects.

Core Employee Generation Study Team (EPS)

Ashleigh Kanat
Project Manager
EPS
1330 Broadway, Ste. 450
Oakland, CA 94612
510-626-8384
akanat@epsys.com

Ashleigh will manage the employee generation study, provide housing policy expertise, technical guidance, quality control, and interact with other members of the team, the Client, and stakeholders.

Brian Duffany
Project Advisor
EPS
730 17th St., Ste. 630
Denver, CO 80202
(303) 623-3557
bduffany@epsdenver.com

Brian will serve in the capacity of Project Advisor as a resource to Ashleigh and the team. He brings particular expertise with housing in mountain resort communities.

Snow Zhu
Deputy Project Manager
Senior Analyst
EPS
1330 Broadway, Ste. 450
Oakland, CA 94612
(510) 841-9190
szhu@epsys.com

Snow will serve as Deputy Project Manager. She will lead for the technical analysis

Rachel Shindman
Research Analyst
EPS
730 17th St., Ste. 630
Denver, CO 80202
(303) 623-3557
rshindman@epsdenver.com

Rachel will support Snow and Ashleigh, with technical IMPLAN analysis; survey data analysis.

Alex Norton
Local Advisor
OPS Strategies
PO Box 1349
Jackson Hole, WY 83001
(307) 690-9892
alex@opsstrategies.com

Local project advisory role – existing impact fee policy knowledge; local nuances applicable to the nexus analysis.

Ashleigh Kanat

Ashleigh has been with EPS for nearly 15 years and has long been involved in the firm's affordable housing projects, including leading recent efforts to improve housing production and increase affordable housing in the cities of Santa Rosa and Healdsburg, California, Mono County, and the Tahoe/Truckee region. She has additional expertise preparing development impact fee and in-lieu fee programs, balancing the dual, and sometimes competing, objectives of wanting to generate revenue to support affordable housing while not impeding market-rate residential development. She has completed affordable housing fee studies for the cities of Clayton, Rohnert Park, Petaluma, and Healdsburg, as well as for Mono County in California.

Snow Zhu

Snow Zhu joined Economic and Planning Systems, Inc. (EPS) in January 2019, bringing academic and professional experience in government data analytics, land use policy, feasibility analyses, and housing research. At EPS, she has served as project manager and analyst on a number of affordable housing and impact fee studies. Prior to joining EPS, Snow was employed at Acumen LLC, a public policy research firm.

Brian Duffany

Brian Duffany is a real estate economist and planner with nearly 20 years of experience in land economics. Brian has a broad base of experience in real estate development feasibility analysis, financial and economic modeling, economic development, economic and demographic analysis, local government finance, fiscal impact analysis, transportation planning. Brian has evaluated proposals and feasibility for development and redevelopment proposals throughout the mountain west and Colorado urban corridor.

Rachel Shindman

Rachel Shindman, AICP, brings several years of experience in many of EPS's practice areas. Her specializations include real estate economics, housing analysis and policy, fiscal and economic impact analysis, and economic development and revitalization. She has a strong skill set for addressing urban economic and policy issues, and her experience in public, private, and non-profit organizations enables her to work successfully with a diverse set of clients.

Core Housing Strategy Team

Wendy Sullivan Project Manager/Facilitation WSW Consulting 1124 Navahoe Dr. S. Lake Tahoe, CA 96150 (303) 579-6702 wendy@wswconsult.com	Willa Williford Co-Manager/Facilitation Williford LLC PO Box 941 Crested Butte, CO 81224 (303) 818-0096 willa@willifordhousing.com
Christine Walker Strategy Analyst Navigate, LLC 152 E. Gill Jackson Hole, WY 83001 (307) 690-4487 christine@navigatejh.com	Ashleigh Kanat Strategy Analyst EPS 1330 Broadway, Ste. 450 Oakland, CA 94612 510-626-8384 akanat@epsys.com
Andrew Coburn Research Analyst Urban Rural Continuum LLC PO Box 452 Ridgway, CO 81432 (720) 464-5821 andrew@urbanruralcontinuum.com	Alex Norton Local Advisory OPS Strategies PO Box 1349 Jackson Hole, WY 83001 (307) 690-9892 alex@opsstrategies.com

Project Budget

We anticipate a total budget not to exceed \$300,000 for all study components, as follows:

Regional Housing Needs Assessment

TASK	BUDGET
Primary Research	
Employer survey	\$9,500
Household/employee survey	\$21,000
Realtor/Lender and Property Manager Focus Groups	\$5,000
Key informant interviews (up to 12)	\$4,800
Housing Needs Assessment:	
Population and Demographics	\$2,500
Jobs, Seasonality, and Commuting (including cost of commuting)	\$4,500
Housing Inventory and Planned/Pending Development	\$4,500
Homeownership Market Conditions	\$4,800
Rental Market Conditions	\$5,500
Housing Problems (overcrowding, cost-burdened, forced to commute)	\$2,500
Loss of housing (redevelopment, STR conversion, sale of homes)	\$3,800
Housing preferences of employees	\$6,000
Current and Projected Needs and Gaps (current needs, future needs)	\$4,800
Affordable Housing Accomplishments and Opportunities and Constraints	
Housing program accomplishments	\$8,000
Housing resources and opportunities and constraints	\$7,000
Development potential inventory (Teton County, ID)	\$7,000
Conclusions and Recommendations	\$5,500
Meetings, Presentation, Management	
Kick-Off Work Session (zoom meeting)	\$2,500
Draft report discussion (conference call)	\$2,500
Final Presentation (prep, travel plus meeting) - 2 consultants present	\$6,800
Contract/Project Management	\$6,500
Local assistance contingency (multi-lingual outreach assistance) - billed as needed	\$10,000
TOTAL	\$135,000

Bill rates and anticipated time spent by each team member is as follows:

	Bill rates	% hours spent
Wendy Sullivan (WSW)	\$230	30%
Christine Walker (Navigate)	\$195	15%
Willa Williford (Williford)	\$195	15%
Andrew Coburn (Urban Rural Continuum)	\$145	30%
<u>Alex Norton (OPS)</u>	<u>\$145</u>	<u>10%</u>
Weighted Average	\$184	100%

Employee Generation by Land Use Study

TASK	BUDGET
Task 1: Project Initiation	\$9,160
Task 2: Residential Nexus Analysis	\$30,240
Task 3: Commercial Linkage Fee Nexus Analysis	\$33,740
Task 4: Fee Level Recommendations and Presentations	\$21,220
Task #5: Evaluation of Tourism Impacts	\$12,900
TOTAL	\$107,260

Bill rates and anticipated time spent by each team member is as follows:

	Bill rates	% hours spent
Ashleigh Kanat	\$275	30%
Brian Duffany	\$215	10%
Snow Zhu	\$175	40%
<u>Rachel Shindman</u>	<u>\$155</u>	<u>20%</u>
Weighted Average	\$205	100%

Housing Strategy Planning

TASK	BUDGET
Session 1: Housing needs, goals, program orientation	\$6,500
Session 2: Strategies: existing, new options, prioritization	\$8,500
Public work session: elected officials (2 budgeted)	\$9,600
Public open houses (2 proposed)	\$8,500
Session 3: Strategies: priorities, steps, roles, timing	\$9,500
Session 4: Draft plan orientation, edits	\$6,500
Final plan	\$3,600
Public presentation	\$4,800
TOTAL	\$57,500

Bill rates and anticipated time spent by each team member is as follows:

	Bill rates	% hours spent
Wendy Sullivan (WSW)	\$230	25%
Ashleigh Kanat (EPS)	\$275	10%
Christine Walker (Navigate)	\$195	10%
Willa Williford (Williford)	\$195	25%
Andrew Coburn (Urban Rural Continuum)	\$145	25%
Alex Norton (OPS)	\$145	5%
Weighted Average	\$197	100%

Scope of Work

Approach and Methodology

This section provides a brief overview of our proposed methodology for both a Regional Housing Needs Assessment and an Employee Generation by Land Use Study. Because each study requires a very different technical approach, we have provided a separate overview for each study. It is our understanding that, if our team is chosen, we will work with the client and stakeholder group in May to define a more detailed scope that best meets your goals.

Study Integration

Despite each study requiring a different technical approach and the outcomes serving a somewhat different purpose, the studies utilize some common data sources and will rely on each other to help target policies and programs appropriate to address workforce housing needs and utilize study findings. We propose to integrate the study process and outcomes, however, in the following manner:

- Stakeholder Groups: In the beginning, we will work with the client to identify the members from the stakeholder groups that are best suited to assist with each study. Because the geographic coverage of the Employee Generation study is smaller and more technical in nature, the stakeholder groups will most efficiently be a subset of the entire group.
- Coordinated Data: We will consolidate the common local data resources that we need for each study in one joint request for information to minimize the impact on the client and stakeholder group.
- Employer Survey: The proposed employer survey as part of the Housing Needs Assessment will provide information useful for both studies; and

- Strategy Planning Component: We propose a Strategy Planning component that will help orient the client and stakeholders on how to best use the studies for policy and program development. We will discuss policy options, show how the interplay of various programs (existing and new) can help achieve results, and work through how to combine the information from each study and shape effective policies to meet identified housing needs and address employee generation impacts. This outcome will shape a housing implementation strategy plan, prioritizing strategies and steps, establishing a timeline for implementation, and defining roles from multiple stakeholders to help the region move forward in addressing identified housing needs.

Regional Housing Needs Assessment

We propose an approach to the Regional Housing Needs Assessment that will identify workforce housing needs, as requested. The study will cover the geographic region of Teton County, Wyoming, Teton County, Idaho, and the northern portion of Lincoln County, Wyoming (defined by census tracts 9782 and 9784, which extends just south of Smoot).

With engaged representatives from each county area in the study region on the stakeholder groups, we propose to provide a report that covers the below items for the region and each county/county area:

- A demographic overview, housing market analysis, economic overview, and review of existing housing conditions (age, type, amount);
- Loss of workforce housing units through redevelopment, short-term rental impacts, and sales, focusing on units lost since the most recent 2014 housing assessment. This will be done to the extent that local and secondary data is available;
- Commuting patterns in the region, including workers that live where they work or commute in or out for jobs. A household and employee survey will be utilized to understand the demographics and housing preferences (including location) of commuters compared to local workers;
- Existing workforce housing stock, including deed restricted, land development restricted, employer restricted and “naturally occurring” workforce housing units;
- The current types of jobs, wages, number of year-round and seasonal jobs, and average jobs held per working adult;
- Percentage of employees living locally, with seasonal variations as applicable;
- The gap between income and housing affordability; and
- Workforce housing demand by number, type, and price point. This will include catch-up needs (e.g. the current undersupply of housing for the workforce) and keep-up needs (e.g. housing units needed to keep up with expected retirement rates and job growth). Projections of need will cover a five-year timeframe and include a Microsoft Excel model that can be updated by the client on a regular basis. We find that longer term projections are quickly outdated (e.g. the 2007/08 recession and recent COVID event is

proof of that). Further, the most effective housing programs require regular check-ins on progress and updates to ensure that strategies remain on track.

Data sources will include a mix of local data, survey research, interviews and focus groups, and available secondary/public data sources (e.g., Census, American Community Survey (ACS), Quarterly Census of Employment and Wages (QCEW), Bureau of Economic Analysis (BEA), Longitudinal Employer-Household Dynamics (LEHD), etc.).

- Local data. We will seek stakeholder member assistance to acquire local data and helpful research and studies. This will include data on building permits, housing programs, development codes, land availability and zoning, multiple listing service/home sales data, rental market information, among other needs.
- Employer survey. A short online survey will be widely distributed to businesses in the region, with direct outreach to primary employers (government, school districts, resorts, hospital, etc.) to better ensure their response. We will seek assistance from local Chambers and other entities to promote the survey through effective channels (social media, radio, newspaper, employer meetings, etc.) and distribute the link to businesses in the region. The employer survey will probe the number of employees, where workers live (commute patterns), employee retention and recruitment issues, unfilled jobs, retiring employees, and the provision of housing units and/or assistance. We will work with the client and stakeholders to finalize the survey questions and topics.
- Household/Employee survey. We will conduct a survey of local households and employees throughout the region. The survey will field topics not available through secondary sources, such as housing and community preferences, satisfaction with current housing conditions and needed repairs, analysis of tradeoffs, desire for commuters to live closer to work, housing problems such as displacement (due to owners selling homes, short term rental conversion, rent increases, etc.) and overcrowding, among other factors. We will work with the client and stakeholders to finalize the survey questions and topics.

The survey will be designed for English- and Spanish-speaking households. The primary format will be online, but paper surveys can be made available for targeted survey outreach by local organizations and service providers. The primary method of distribution will be through employers to their employees, along with broader notification through print media, newsletter notifications, and social media. We will also seek outreach assistance from the stakeholder group and local organizations to ensure the best success.

We have included a budget line item that we will use to recruit local multi-lingual survey outreach assistance. Community members and organizations that work with the populations of interest have the best insight into how to engage participation and where and how to reach them. We had fantastic success reaching bi-lingual and marginal populations when we conducted the 2014 Western Greater Yellowstone Regional Housing Needs Assessment, in large part because of the engagement of trusted

local groups to reach hard-to-reach populations. Additionally, we find incentives, such as a drawing for \$100 gift cards, to be very helpful. We will refine the outreach methodology with the client and stakeholders to ensure representative participation.

- Focus groups and key informant interviews. We will use a combination of focus groups, and key informant interviews with housing market professionals, developers and builders, lenders, housing service providers, employers, area jurisdictions, and others to collect local insight and data for report analysis. We find a focus group with area real estate agents and lenders in particular to be valuable over individual interviews because shared and unique experiences are highlighted, and we all learn from each other. We will refine the interview list with the client and stakeholder group, including 2-3 Lincoln County interviews.

Finally, the draft report will be submitted to the stakeholder groups for review and input. The final report will incorporate comments received and be presented by the consultant to the Teton County, WY and Teton County, ID elected officials at one public meeting. The elected officials from Lincoln County, WY may also participate in this meeting.

Additional Study Sections

In addition to the above information, we will include two separate reports for Teton County, WY and Teton County, ID with the following items, which will be useful when evaluating strategies to address housing needs:

Housing Program Accomplishments and Challenges

We propose to gather and present information on workforce and other restricted housing units produced to date, loss of units through sunset clauses, the rate of production, and the performance of current housing programs. This section will be useful when considering strategies and next steps to understand what has worked well and where changes or alternative approaches may be needed to address existing and projected needs.

Housing Resources, Opportunities and Constraints

We propose to provide an overview of workforce housing opportunities and constraints in the region, to include:

- Public land and resources available for housing;
- Local workforce housing financing sources and organizations; and
- Development environment, including the cost of development, development codes and requirements, and challenges and opportunities as expressed through interviews with local developers and others.

Development Potential Inventory (Teton County, ID)

This proposal includes producing an inventory of the Teton County, ID development potential based on current zoning. There are challenges with producing this type of inventory (land

constraints, how to factor in bonuses and incentives, etc.) and we suggest discussing the purpose to determine whether there are other methods to achieve the desired purpose of this inventory.

Project Considerations

Stakeholder Groups. Because of the regional nature of this study and the necessary access to local data, our proposed scope and fee anticipates that two stakeholder groups will be utilized, one with Teton County, WY representation and another with Teton County, ID representation. At least one connected representative from each county jurisdiction and incorporated community jurisdictions in the study area will be included in the stakeholder groups. Other helpful participants typically include housing service providers, core community organizations and foundations, primary employers, and real estate and development community members. We will work with the client at the start of the process to develop a diverse stakeholder group.

Deliverables

- A clear, well documented, transparent report on the Regional Housing Needs, Resources and Opportunities in the region, an executive summary, along with breakout information for each county/county region will be provided. This report will document our research, methodology, data, and trends, as defined above. This will provide the information needed to help target housing strategies and develop the Housing Strategy Component specified below.
- An outline of the report will be provided shortly after the kick-off meeting.
- Microsoft Excel model of five-year projected housing needs that can be updated by the client on a regular basis

Employee Generation by Land Use Study

With the proposed work plan, below, EPS will deliver to the Town/County a technically robust and legally defensible fee program that accurately reflects the impact of new development on the need for affordable, workforce housing. We propose to use primarily publicly-available and trusted data sources, tailored by local input and conditions. This approach will allow for a transparent process and straight-forward fee updates in the future. If our team is selected, we will refine this work plan with town and county input to ensure the final work product supports town/county needs regarding affordable housing policy, including legal, economic, and political considerations.

The below proposed process will provide the town/county with the following:

- Residential job generation based on household expenditures on local goods and services. This will include brick-and-mortar and non-brick-and-mortar spending;

- Residential job generation due to the construction and maintenance/management of homes;
- Commercial job generation linked to new commercial space; and
- A separate component evaluating the impacts of tourism on job generation; another significant component of job growth and demand in Teton County.

The work plan, as described below, will include the following key considerations:

- Full-time, part-time and seasonal employees generated by non-residential development;
- Full-time, part-time and seasonal employees related to household spending on construction and management/maintenance of homes, by type of residential use; and
- Full-time, part-time and seasonal employees generated by residential uses through expenditures on local goods and services, by type of residential use.

Non-Brick-and-Mortar Businesses. Job generation for these businesses is not tied to commercial space. Alternative approaches to both estimating job generation and addressing employee housing needs related to job growth are needed. For example, an employee head tax or business license fee are options not tied to commercial space that have been implemented by other communities; however, these are fees imposed on the business owner and, as such, may have undesirable effects.

Two components of the analysis will incorporate non-brick-and-mortar jobs:

- Job generation through residential occupant expenditures; and
- Job generation based on visitor expenditures/tourism impacts, which affect services that often have little or no commercial base (e.g., guide services, short-term rental managers, independent housekeepers, etc.).

We will further clarify with the client which businesses are considered to fall into this category early in the process and discuss the client's desired direction with the various options mentioned above, among others, to target the analysis appropriately.

Task 1: Project Initiation

EPS will participate in a project initiation kick-off conference call (or video conference) with the identified stakeholder groups for this study, including potentially legal counsel, to discuss the overall context of the impact fee study and the Town's and County's specific objectives.

At the Project Initiation meeting, we will address the following topics:

- **Approach to funding affordable housing and legal context.** We will discuss the Town/County's overall approach to funding affordable housing to ensure that we share a common understanding of the existing policies and programs that are to remain and which may change.

- **Basis for calculating financing gaps and fees.** With reference to best practices from past work and in other mountain resort communities, we will discuss the merits of distinguishing impacts and resulting fees by product type, by unit size, or by unit price. We will also discuss appropriate assumptions to address local geographic differences and exceptions or special requirements for certain types of development (i.e., large, single family homes, etc.). EPS will coordinate with Alex Norton/OPS to help identify appropriate assumptions based on local market factors.
- **Verify Commercial Categories.** We will also clarify with the Town/County staff and stakeholder group which businesses fall within each preferred business category for which mitigation will be required. This includes also understanding which businesses fall into the non-brick-and-mortar category (e.g., home offices, independent contractor networks, etc.), as well as potential approaches to reflect the impacts on non-brick and mortar employment.
- **Required data needs.** EPS, WSW, and OPS will coordinate to prepare a request for data and background documents from the stakeholder groups.

Task 2: Residential Nexus Analysis

Task 2 includes the preparation of the residential nexus study to support the Town's and County's consideration of updated housing fees. The analysis will show the nexus (i.e., linkage) between development of market-rate housing (both rental and for sale housing) and the demand for affordable housing units. The process involves three general steps.

Step 1: Compute Demand for Affordable Housing Generated by Market Rate Units

Demand from new residential development stems from household spending on goods and services at local businesses, spending on activities like recreation or food delivery that support local jobs (but not necessarily at brick-and-mortar establishments), as well as spending on construction, maintenance, and upkeep of the residence.

The first step is to estimate the impact that additional market-rate housing has on job creation and employee housing. Using data on resident expenditure patterns and wage levels for specific types of business, IMPLAN will be used to estimate the demand for local goods and services generated by the addition of market-rate housing and its occupants. The number of local employees and worker households needed as a result of that demand will be estimated, along with the number of worker households who cannot afford market-rate housing. The incomes of households occupying the market-rate homes drive these figures — the higher the cost of the housing, the higher the occupants' income and spending, resulting in proportionate job creation. EPS will calculate impacts for a range of unit types, sizes, and/or price levels.

Step 2: Affordability Gap Analysis

The second step is to determine whether and how much subsidy is required to provide new housing units for worker households of various income levels (e.g., moderate, low, and very low). This requires estimating the costs of development (land, construction, fees, required

financial returns, etc.) and the prices at which the units are affordable to income-qualified and/or workforce households. The extent to which development costs exceed affordable prices or rents defines the subsidy or financing gap.

This calculation requires some local inputs and assumptions, which EPS will discuss with the Town/County and adjust accordingly.

Step 3: Compute Impact Fee per Market Rate Unit

The third step is to calculate the subsidy required to produce housing affordable for new worker households and allocate that subsidy to the market-rate project driving that demand. The maximum justifiable impact fee will be calculated consistent with this nexus logic. The results will include different nexus-based fees for housing units at various sizes or price levels. The equivalent number of units required at different income levels can also be provided, if desired, which may be used as a standard for allowing developers to address their impacts through provision of units on site rather than payment of the impact fee.

The draft nexus analysis report will be provided for Town/County staff and stakeholder group review. The report will be revised based on comments received, issued for stakeholder outreach, and presented at a public hearing for eventual adoption.

Task 3: Commercial Linkage Fee Nexus Analysis

In this task, EPS will recalculate the County's affordable housing fee for nonresidential development. Business categories will be defined with Town/County input to ensure consistency with local requirements.

The nexus between new nonresidential development and the demand for affordable housing is derived by preparing employment density and compensation estimates of future employees for several nonresidential land use types (e.g., retail, office, industrial, lodging, etc.). New household formation resulting from new employment will be categorized by income category (e.g., moderate, low, very low) to estimate total housing demand. Calculations will consider local trends in household formation (e.g., size and location of households). The demand by land use category will be converted into a fee per-square-foot of commercial development based on the affordability gap calculations derived in **Task 2**.

EPS proposes to use the IMPLAN model in its economic impact methodology. This methodology has been the basis of several recent affordable housing linkage fees, including for Denver and Vail, Colorado. This provides several advantages over a survey-based method (i.e., surveying households and businesses on employment generation), including transparency, availability, and faster and lower cost updates.

EPS recognizes the potential for "double-counting" of income-qualified households generated by the residential and nonresidential nexus approaches (e.g., some of the grocery store workers

who need affordable housing may be represented in both analyses). The advantage to this approach, however, is that it provides additional flexibility when assessing worker housing impact fees among commercial and residential uses depending upon policy goals and other community priorities. In a later task, EPS will reconcile these double-counting issues through recommendations on implementation of the fees at specific levels for different uses.

EPS will prepare a draft report summarizing the results of the nonresidential nexus impact analysis. After incorporating Town/County staff and stakeholder comments, EPS will issue a revised report for purposes of the public hearing process. EPS will prepare a final report for Town/County adoption.

Task 4: Fee Level Recommendations and Presentations

Task 2 and **Task 3** will produce “maximum supportable fees,” meaning the highest amount that the Town/County could charge different types of development to satisfy their affordable housing requirements and/or mitigate their full impact on affordable housing demands.

Due to potential adverse impacts on desired development, the implementation of other workforce housing production programs or funding sources, the double-counting issue discussed above, and other reasons, the Town/County should consider setting impact fees below the maximum nexus levels. In **Task 4**, EPS will assist the Town/County to identify and assess such mitigating factors and recommend fees for implementation.

Task 4.1: Housing Fee Feasibility Analysis

It may not be practical to charge the maximum supportable fees because the fees would create too great of a financial burden on new development. In this task, EPS will utilize prototypical pro formas for residential and nonresidential development (two types of residential and four types of nonresidential) to determine whether the maximum fees represent a burden on development and, if so, estimate a more practicable fee. EPS will reach out to developers and real estate professionals active in the area to confirm pro forma assumptions.

Task 4.2: Fee and Implementation Recommendations

EPS will work with the Town/County to develop fee recommendations that are within the maximum allowable by nexus, consistent with findings from Task 4.1, avoid double-counting, and work with other programs or funding sources that may be in place to help produce workforce housing. The recommendations will include the formulae for annual adjustments to the fees, which can be reasonably replicable by staff on an ongoing basis.

The deliverable from this task will include 1) a recommended fee schedule for residential and nonresidential development; 2) a comparison of the recommended fee program with the existing fee programs; and 3) a summary implementation process, including recommended adjustment formulae.

Task 4.3: Meetings, Presentations, and Public Hearings

At key points during the Study (e.g., upon project initiation, once preliminary fees are calculated, and a final presentation once final fee levels are determined), EPS will meet with the Town/County stakeholder group for feedback and direction. The budget range assumes these meetings will occur by phone or video conference. To the extent that EPS needs to meet with developers, stakeholders and elected officials beyond the outreach contemplated as part of the overall project, EPS will bill for these meetings on a time and materials basis.

EPS will be available to present the final draft versions of the nexus studies, feasibility analyses, and fee recommendations to the Town and County decision makers. Our budget assumes that we will participate in one in-person public hearing. EPS can be available for additional public meetings, if needed, and will bill for these meetings on a time and materials basis.

Evaluation of Tourism Impacts

The impact fee program will mitigate the demand for housing that results from expanding employment at new hotels or at new retail, restaurant, and service commercial development (i.e., employees that work in the newly developed space need housing in the region). The impacts of visitor spending at existing physical or non-brick-and-mortar businesses will need to be evaluated in other ways and cannot be mitigated with an impact fee charged to new nonresidential development.

This section will evaluate job generation based on visitor expenditures, which affect services that often have little or no commercial base or non-brick-and-mortar businesses (e.g., guide services, short-term rental managers, independent housekeepers, etc.). Transient occupancy tax or tax on recreational sales are some methods to reach this impact; although it is recognized these measures currently have state legislative limits in Wyoming.

Methodology

This task will build off of visitor surveys, data, and other studies available through the Travel and Tourism Board and other area experts. A visitor spending profile will be prepared to segment and scale visitor expenditures, and to ensure there is no double counting between the impact fee program. EPS will use IMPLAN to estimate the number of jobs supported by direct visitor spending in key segments of the local economy and associated wages. Household formation, potentially informed by the housing needs assessment, will be categorized by income category (e.g., moderate, low, very low) to estimate total housing demand from employees in jobs that support the visitor economy.

Deliverable

- Memorandum outlining the methodology, assumptions, and results.
- Illustration bringing together the Housing Needs Assessment, Nexus Study, and Tourism Jobs analysis. This will graphically illustrate the various components of demand that drive jobs in the Jackson/Teton County area – tourism, residents, and commercial and residential development; the relative proportion of jobs generated; and linking to various strategies that can be implemented to address each demand component. This will be useful when moving from the analyses into the Strategy Planning sessions.

Housing Strategy Planning

An outline of a proposed process is provided below based on existing knowledge and information on the region. We propose to revisit the proposed approach below with the client and stakeholder groups in January 2022 to determine if adjustments are needed. Any adjustments made will be with the understanding that they occur within the currently proposed budget, if not less. The extent to which meetings proposed below are held in person or via remote video calls, or a combination, can also be finalized at that time.

We propose to hold four (4) work sessions with the Strategy Group. In general:

- All sessions will be scheduled for two-hours and have a meeting facilitator and technical representative from our team present.
- Prior to each work session, Housing Working Group participants will receive a summary of the prior work session, information from the Housing Needs and Nexus studies related to the work session topic, and questions to help prepare participants for each session.

Session 1: Program Orientation, Housing Needs, Goals

This first session will occur after the presentation of the results of the analysis of Housing Needs and Housing Nexus studies, the data from which will form the basis for housing strategy discussions. Up to two consultants will be present. The goal will be to:

- Present an overview of the housing strategy process;
- Explain the role of stakeholder members;
- Present the work session schedule;
- Review housing goals in light of identified housing needs; and
- Set the stage for the next work session – exploring existing and new strategies.

Participants will be provided with necessary information and questions that can help them prepare for the first work session.

Session 2: Existing and New Strategies

We will work with the strategy group to identify housing policies to address various components of housing needs identified and work toward defined goals. This will explore existing and new strategies to cover the range of needs, within the context of potential partners and resources. We will explore the performance of existing strategies and best practices with the group for existing and potentially new strategies to target where modifications or additions may be desirable.

The list of preferred strategies out of this session will be presented to elected officials and through open houses to the public for their input, which will feed into the next work session.

Session 3. Strategy Priorities, Steps, Roles, Timing

Using the policies, goals and objectives established in the first work sessions and input from the open houses and elected officials, we will refine and prioritize the strategies to pursue. We will discuss each strategy to identify steps for implementation, which partners will be involved, and when various strategies will be implemented. This will prepare the housing strategy for action.

Session 4. Draft Plan Refinement

We will pull together the Strategy Plan into one package and work through the Plan with the Stakeholder Group to reality check the results, recheck priorities, and firm up roles. This will also broach the topic of management and capacity and the overall management structure to ensure the Strategy Plan continues to have life, is tracked and updated, regional and local partnerships continue, and communication to the broader community occurs on a regular basis.

The objective is to define an strategy plan with clear goals and objectives, strategies and policies, timeline for achievement and responsible parties. The plan will also define a mechanism to monitor progress and an update process so that the plan can evolve with housing needs over the long term.

Meetings and Presentations

Elected Official Work Sessions. Two work sessions will be held with the elected officials. The first will occur after the Stakeholder Group has reviewed existing and potential new strategies (Session 2) and discuss the outcome with the town of Jackson and Teton County elected officials in a public work session. The input will help the Stakeholder Group refine and prioritize strategies at Session 3.

Public Open Houses – Teton County, WY. This will occur after the Stakeholder Group has reviewed existing and potential new strategies (Session 2). An overview of the housing needs, housing goals, and currently proposed housing strategies will be presented to the public for their feedback and input. The input will help the Stakeholder Group refine and prioritize strategies at Session 3.

Final Plan and presentation. We will issue the final Housing Strategy Plan and present the Plan in June at a public meeting. We will prepare Power Point slides to support our presentation. Two of our team members will attend and participate in this session. Some members of the Stakeholder Group may also assist with the presentation, a step which helps build ownership by the community.

Deliverables

We propose to provide:

- A Housing Strategy Plan specifying housing goals and objectives, strategies/policies to meet identified goals, a timeline for implementation and assignment of responsibilities to carry out the plan. Also included will be recommendations on Plan management, continued local and regional partnership discussions, and updates/tracking.
- Additional information and documentation as part of this study process, including compiled information from public meetings; work session materials and discussions; and presentations (Power Points, etc.).

Town/County Staff Support

Client will assist and support the consultant team with the following tasks:

- Recruiting Technical Stakeholder Group Members. To the extent that members of this group need to be confirmed, client will identify and recruit the community members and staff to participate in this group.

Members will be expected to help provide information and contacts for focus groups or interviews during the study, participate in the project kick-off and finalizing the study scope, assist with survey outreach and promotion, review draft reports, participate in the policy and implementation session, and attend and/or participate in the final presentation. We hope that stakeholders members will keep their constituencies or membership (as may be applicable) apprised of the process and share their input.

- Focus Groups and Interviews. Identifying, providing contact information for, and recruiting Realtors, lenders, property managers, developers, builders, etc. to participate in interviews or focus groups. If focus groups are not conducted by video conference/Zoom, then client should provide a meeting room and refreshments.
- Data. Assistance compiling needed town/city and county data, including existing reports/studies, Assessor data/contacts, planning/building department records, etc.
- Surveys. Assistance promoting the surveys through various media (radio, newspaper, websites, etc.), distributing the surveys to employers, and publicizing the online survey links. We propose to have a budget line item to solicit additional survey support from local organizations and service providers to help conduct outreach to multi-lingual communities and hard-to-reach populations.
- Media Outreach/Publicity. Press releases, interviews for articles, and widespread notification of the study.
- Stakeholder Group/Consultant Communication. Forwarding materials, relaying issues that may arise, sending reminders of meetings and presentation schedules, setting up Zoom/video sessions.
- Meeting Support. Organizing and providing the meeting place/venue for in-person meetings, refreshments for participants, public notice when applicable, work session materials (white boards, projectors, etc.) as needed by consultants.

Schedule

The below schedule identifies the primary tasks and timeline for the Regional Housing Needs Assessment and Employee Generation Study separately, although both will occur over the same timeframe.

Regional Housing Needs Assessment	May	Jun					Jul				August				Sept					October				Nov				Dec				Jan				Feb			
Week	Month	1	2	3	4	5	1	2	3	4	1	2	3	4	1	2	3	4	5	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Finalize scope	x	x	x																																				
Kcik off meeting (stakeholder group)				x																																			
Employer survey draft							x																																
Household/employee survey draft							x																																
Surveys in the field															x	x	x	x	x	x																			
Interviews and focus groups				x	x	x	x	x	x	x																													
Data collection (local, secondary)				x	x	x	x	x	x	x	x	x																											
Analysis/write up																				x	x	x	x	x	x	x	x	x	x										
Draft needs assessment and recommendations																																							
Draft assessment review - conference call																																							
Final report and presentation																																							

Employee Generation Studies	May	Jun					Jul				August				Sept					October				Nov				Dec				Jan				Feb				
Week	Month	1	2	3	4	5	1	2	3	4	1	2	3	4	1	2	3	4	5	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
Kick-off meeting/confirm analytical approach/finalize scope	x																																							
Confirm analytical assumptions with Stakeholder Group				x	x	x	x	x	x	x																														
Collect data and set up models						x	x	x	x	x	x	x	x	x																										
Preliminary fee calculation tables													x	x	x	x																								
Revised fee calculation tables																x	x	x	x																					
Admin draft/draft report																			x	x	x	x	x	x	x	x														
Maximum vs. feasible fee levels																												x	x	x										
Final report and presentation																																				x	x			

Shaded columns indicate holiday periods (Thanksgiving, Christmas and New Years)

The below schedule identifies the primary tasks and timeline for the Housing Strategy Planning.

Housing Strategy Planning	Feb				Mar				Apr				May				June			
Week	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Session 1: Housing needs, goals, program orientation		x																		
Session 2: Strategies: existing, new options, prioritization					x															
Public work session: electeds							x													
Public open houses							x													
Session 3: Strategies: priorities, steps, roles, timing											x									
Session 4: Draft plan orientation, edits														x						
Final plan																	x			
Public presentation																				x

Shaded columns indicate spring break in Teton County, WY.

AGREEMENT FOR EMPLOYEE GENERATION BY LAND USE STUDY (“NEXUS STUDY”) & A REGIONAL HOUSING NEEDS ASSESSMENT

This Agreement for Services (“Agreement”) is entered into this ____ day of June 2021, (hereinafter referred to as the effective date of the Agreement) by and between Teton County, a duly organized county of the State of Wyoming, P.O. Box 1727, Jackson, Wyoming 83001 (“County”) and WSW Consulting, Inc., a California corporation, 1124 Navahoe Drive, South Lake Tahoe, CA 96150 (“Contractor”).

Witnesseth

WHEREAS the Jackson/Teton County Housing Authority is a Regional Housing Authority jointly funded by both the Town of Jackson, Wyoming and Teton County, Wyoming; and

WHEREAS the Jackson/Teton County Housing Department is a joint department of Town of Jackson and Teton County that is operated on a day-to-day basis by Teton County; and

WHEREAS the Town of Jackson and Teton County are committed to increasing the supply of stable, affordable housing for the local workforce to meet community goals related to Quality of Life, Ecosystem Stewardship, and Growth Management as set forth in the joint Jackson/Teton County Comprehensive Plan; and

WHEREAS Teton County and the Town of Jackson issued a Request For Qualifications (RFQ) for a consultant qualified to prepare (1) an Employee Generation By Land Use Study (“Nexus Study”) and (2) a Regional Housing Needs Assessment; and

WHEREAS in response to the RFQ, Contractor submitted their qualifications and a proposal to provide the requested services dated April 2, 2021; and

WHEREAS Contractor was selected by the Town of Jackson and Teton County to provide the desired services; and

WHEREAS the Town of Jackson and Teton County have determined that Teton County shall enter into a contract for the services with Contractor; and

WHEREAS the County desires to hire Contractor and Contractor desires to provide the services outlined in the RFQ as well as certain additional services that were discussed during the proposal review period, which the Town of Jackson and Teton County determined would be added to the consultant’s scope of work; and

WHEREAS Contractor and their team have the necessary qualifications, skill, and experience to provide the services requested in the RFQ and the additional services; and

WHEREAS the County and Contractor have agreed upon the final scope of work and a project budget for the services to be provided, which is set forth in a revised final proposal prepared by Contractor; and

NOW THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree to the terms and conditions set forth herein.

Article 1. Statement of Work

Contractor shall provide professional services to the County for (1) an Employee Generation By Land Use Study ("Nexus Study") and (2) a Regional Housing Needs Assessment ("Project") as more fully described in the Scope of Work set forth in Contractor's revised final proposal that is attached hereto as **Exhibit A**.

Article 2. Timetable

Contractor shall complete the professional services for the Project by July 1, 2022. Contractor shall be paid for the work performed up to the point of termination.

Article 3. Compensation and Payment

The County agrees to pay Contractor as full compensation for all services provided for the Project, a fee not to exceed **Two Hundred Ninety-Nine Thousand Seven Hundred Sixty Dollars (\$299,760.00)** in accordance with the Project Budget found in Contractor's revised final proposal attached as Exhibit A. It is specifically understood and agreed to by Contractor, that the amount listed is a "not to exceed" amount. Contractor shall not receive compensation in excess of the total "not to exceed" amount as set forth in this Article without the prior written approval of the Teton County Board of County Commissioners. The amount of permissible compensation is more fully described in the Project Budget.

The amount of compensation shall not vary as a result of the time of day the services are performed or the number of hours during which services are performed in any given period of time. The County may examine all records of Contractor during reasonable hours for a period up to and including one (1) year after termination of this contract in order to audit and verify the aforesaid charges.

Contractor shall present an appropriate voucher to the Clerk of Teton County upon the delivery of each Project component, task, and/or deliverable which are fully defined within the Scope of Work and the Project Budget.

Article 4. Term and Termination Without Cause

The terms of this Agreement shall commence on the effective date of this Agreement and shall expire July 1, 2022. Contractor or County may terminate this agreement at any time with or without cause by giving thirty (30) days written notice to the other its intent to terminate this Agreement; provided, however, that all compensation earned or costs incurred prior to such termination shall be payable to Contractor. The provisions of Article 8 shall survive termination or expiration hereof.

Article 5. Place of Performance

Contractor shall be responsible for maintaining its own office facilities and will not be provided with either office facilities or secretarial support by the County. The Contractor shall supply at its own expense, all materials, supplies, equipment, and tools required to accomplish the work that is agreed to be performed in accordance with this Agreement.

Article 6. Independent Contractor Status

It is understood and agreed the Contractor will provide the services under this Agreement on a professional basis and as an independent contractor and that during the performance of the services under this Agreement, Contractor's employees will not be considered employees of the County within the meaning or the applications of any federal, state, or local laws or regulations including, but not limited to, laws or regulations covering unemployment insurance, old age benefits, worker's compensation, industrial accident, labor, or taxes of any kind. Contractor's employees shall not be entitled to benefits that may be afforded from time to time to County employees, including without limitation, vacation, holidays, sick leave, worker's compensation and unemployment insurance. Further, the County shall not be responsible for any such withholding or paying of taxes or social security.

Article 7. Trademark and Trade Name

This Agreement does not give either Party any ownership rights or interest in the other Party's trade name or trademarks.

Article 8. General Provisions

A. Entire Agreement

This Agreement represents the entire and sole agreement between the Parties with respect to the subject matter hereof and supersedes any and all prior negotiations, understanding, representation, or consulting agreements whether written or oral. This Agreement cannot be modified, changed, or amended, except in writing signed by the Parties.

B. Waiver

The failure of either Party to require performance by the other of any provision hereof shall in no way affect the right to require performance at any time thereafter, nor shall the waiver of a breach of any provision hereof be taken to be a waiver of any succeeding breach of such provision or as a waiver of the provision itself. All remedies afforded in this Agreement shall be taken and construed as cumulative; that is, in addition to every other remedy available at law or in equity.

C. Relationship

Nothing herein contained shall be construed to imply a joint venture, partnership, or principal-agent relationship between Contractor and the County; and neither Party shall have the right, power, or authority to obligate or bind the other in any manner whatsoever, except as otherwise agreed in writing.

D. Assignment and Delegation

Neither Party shall assign or delegate this Agreement or any rights, duties, or obligations hereunder without the express written consent of the other. Subject to the foregoing, this Agreement shall inure to the benefit of and be binding upon the successors, legal representatives, and assignees of the Parties hereto.

E. Severability

If any provision of this Agreement is declared invalid or unenforceable, such provision shall be deemed modified to the extent necessary and possible to render it valid and enforceable. In any event, the unenforceability or invalidity of any provision shall not affect any other provision of this Agreement, and this Agreement shall continue in force and effect, and be construed and enforced, as if such provision had not been included, or had been modified as provided above, as the case may be.

F. Governing Law

This Agreement shall be governed by, and construed in accordance with, the laws of the State of Wyoming, without giving effect to the principles of conflict of laws thereof. The Parties hereto irrevocably elect as the sole judicial forum for the adjudication of any matters arising under or in connection with this Agreement, and consent to the jurisdiction of, the courts of the County of Teton, State of Wyoming, or the United States of America for the District of Wyoming. This Agreement was negotiated by both Parties hereto. As such, this Agreement shall not be construed against or in favor of any Party by virtue of which party drafted the Agreement or any portion thereof.

G. Dispute Resolution

In the event of a dispute arising under the terms of this Agreement the Parties shall, prior to resort to the Courts, enter into good faith efforts to mediate their differences. The Parties shall jointly select a disinterested third party to act as a mediator to facilitate the resolution of their dispute. In the event the Parties are unable to jointly decide on a mediator, they shall each select an impartial representative, the two of whom shall decide on the mediator. The mediator shall, within ninety (90) days, conduct a hearing on the matter, and submit his or her findings and conclusions to the Parties. The provisions of W.S. §§ 1-43-101 through 1-43-104 shall apply to the mediation process. Each of the Parties shall share equally in the cost of the mediator but shall otherwise each bear their own costs in the mediation process.

H. Paragraph Headings

The paragraph headings set forth in this Agreement are for the convenience of the Parties, and in no way define, limit, or describe the scope or intent of the Agreement and are to be given no legal effect.

I. Indemnity

Contractor agrees to indemnify and hold County, their officers, agent and employees harmless from any and all claims, damages, costs, liability or expenses (including attorney's fees) arising out of the performance of the Scope of Work as set forth in this Agreement.

J. Declaration by Independent Contractor

The Contractor declares and states that it has complied with all federal, state, and local laws regarding business permits and licenses that may be required to carry out the work to be performed under this agreement.

K. Third Party Beneficiary

The Parties do not intend to create in any other individual or entity the status of third-party beneficiary, and this Agreement shall not be construed so as to create such.

L. Sovereign Immunity

County does not waive their sovereign immunity by entering into this Agreement, and fully retain all immunities and defenses provided by law with respect to any action based on or arising out of this Agreement.

M. Ethics and Standards

Consultant shall conform to all federal, state, local and applicable laws and regulations, and to the highest business ethics in performing its obligations in accordance with the terms of this Agreement.

N. Counterparts

This Agreement may be executed in counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

Article 9. Notice

For purposes of this Agreement, any notice shall be deemed properly sent and received when sent by certified mail with return receipt requested to the parties at the following addresses until or unless changed by one Party giving written notice of such change of address to the other Party:

County

Jackson/Teton County Housing Department
ATTN: April Norton
P.O. Box 1727
Jackson, WY 83001

Contractor

WSW Consulting, Inc.
ATTN: Wendy Sullivan
1124 Navahoe Drive
South Lake Tahoe, CA 96150

IN WITNESS WHEREOF the Parties have executed this Agreement.

Teton County, WY

WSW Consulting, Inc.

Natalia D. Macker
Chairwoman
Teton County Board of County Commissioners

Wendy Sullivan
President
WSW Consulting, Inc.

Attest:

Maureen Murphy, _____ Date _____
Teton County Clerk



JOINT INFORMATION MEETING

AGENDA DOCUMENTATION

SUBMITTING DEPARTMENT: County Administration

PRESENTER: Charlotte Frei

MEETING DATE: March 6, 2023

SUBJECT: Regional Transportation Planning Administrator FY2024 Workplan

STATEMENT/PURPOSE

The purpose of this item is for the Town Council and County Commission to approve the Regional Transportation Planning Administrator's recommended FY2024 workplan. The Boards can approve the Work Plan as recommended or make specific changes before approval.

BACKGROUND/ALTERNATIVES

The Integrated Transportation Plan (ITP) has guided key priorities throughout the first year of the Regional Transportation Planning Administrator role. In addition to continuing with high-priority action items identified in Chapter 7 of the ITP, the attached workplan represents priorities for Fiscal Year 2024 determined by observing regional trends, research, and peer review.

The projects in the attached work plan can build a strong foundation for future transportation supply and demand management if implemented and evaluated comprehensively. These projects were also selected and sequenced to take advantage of the Bipartisan Infrastructure Law funding appropriated through federal fiscal year 2026. The federal FY2026 begins October 1, 2025 and program applications are likely available throughout 2025. To prepare to apply for these funds, specific programs and project designs will need to be determined throughout the Town and County's fiscal year 2024.

The proposed budget reflects the expected level of effort for the RTPA to work independently, with other departments, and/or with consultants to build a foundation for achieving the transportation goals of the Comprehensive Plan and ITP.

COMPREHENSIVE PLAN ALIGNMENT

The guiding vision and chapter goal for Multimodal Transportation (Chapter 7) of the Comprehensive Plan is:

Travel by walk, bike, carpool, or transit will be more convenient than travel by single-occupancy vehicle.

Chapter 7 of the Comprehensive Plan Principles include:

"Principle 7.1 – Meet future transportation demand with walk, bike, carpool, transit and micromobility infrastructure",

"Principle 7.2 – Reduce greenhouse gases from vehicles to below 2012 levels", and

"Principle 7.3 – Coordinate transportation planning regionally. The Town and County do not have jurisdiction over all components of the transportation network, and so we must lead coordinated efforts to achieve our transportation goals. Various Federal, State, local government, and non-governmental entities fund and manage pieces of the transportation system into and within the community. Coordinating the efforts of all of these entities with the land use efforts of the community is the only way we can meet our transportation and ecosystem stewardship goals."

These principles guide transportation planning in Teton County and the Town of Jackson and have guided the attached workplan priorities and tasks. Limiting growth in automobile travel will require coordination and creative mobility solutions such as Mobility Hubs and carsharing while continuing to grow and maintain high-quality START and Pathways networks.

STAKEHOLDER ANALYSIS

Members of the Transportation Advisory Committee (including Town Public Works, County Public Works, Pathways, START Bus, Town Community Development, and County Planning) have provided feedback on the RTPA workplan and budget. The Town Ecosystem Stewardship Manager and Joint Housing Department Director were also consulted regarding Emerging Mobility Action Plan/Mobility Hubs. The Joint Long-Range Planning Department workplan also reflects priority elements of the RTPA's workplan. Teton County School District and Town Public Works were consulted on the Northern South Park/Cottonwood/South Park Loop Road proposed project limits.

FISCAL IMPACT

The total requested budget required to support the proposed FY24 workplan is \$831,500. This includes \$674,500 for professional services and \$157,000 for the proposed new FTE, training, software, travel, dues & subscriptions, and meetings. Actual financial commitments will be considered by the elected officials and as part of adoption of the Town and County budgets.

Professional services requested per project are:

1. Northern South Park, Cottonwood, South Park Loop Road transportation infrastructure planning and design: \$300,000
2. Regional Governance Facilitation: \$90,000
3. Emerging Mobility Action Plan and Mobility Hubs: \$80,000
4. Performance Measurement Support (travel time differential, reporting): \$12,000
5. Regional Transportation Improvement Program (TIP) support: \$10,000
6. Travel Demand Model Updates, Traffic Model Maintenance: \$60,000
7. Regional Parking (Phase 3 Charter) and Park and Rides: \$115,000
8. Travel Demand Management Coordinator Summer Intern: \$7,500

STAFF IMPACT

The impact of preparing this staff report and accompanying documentation was 24 hours for the Regional Transportation Planning Administrator.

LEGAL REVIEW

Gingery, Colasuonno

ATTACHMENTS

Transportation Workplan Project List, including Town Council Workplan

RECOMMENDATION

Staff recommends adopting the workplan as presented in the attached document.

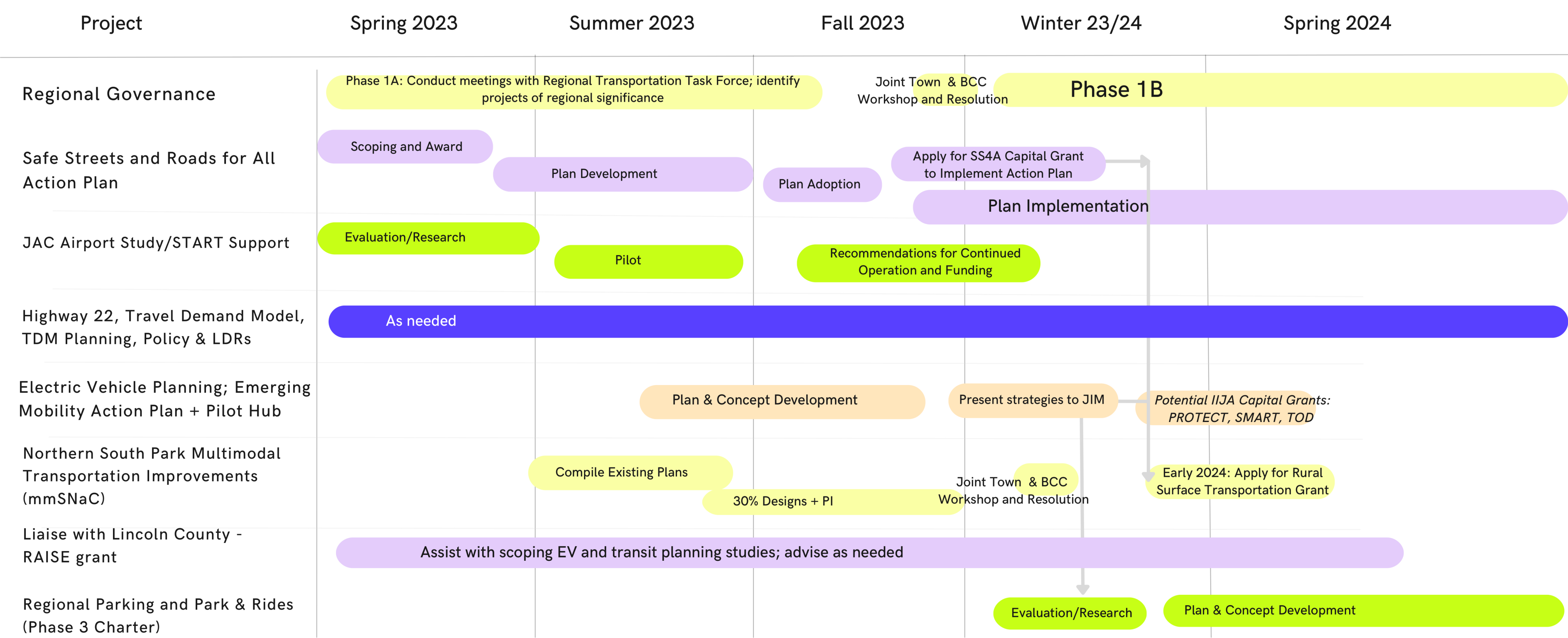
SUGGESTED MOTION

Teton County:

I move to approve the Regional Transportation Planning Administrator's proposed FY2024 workplan dated February 29, 2023.

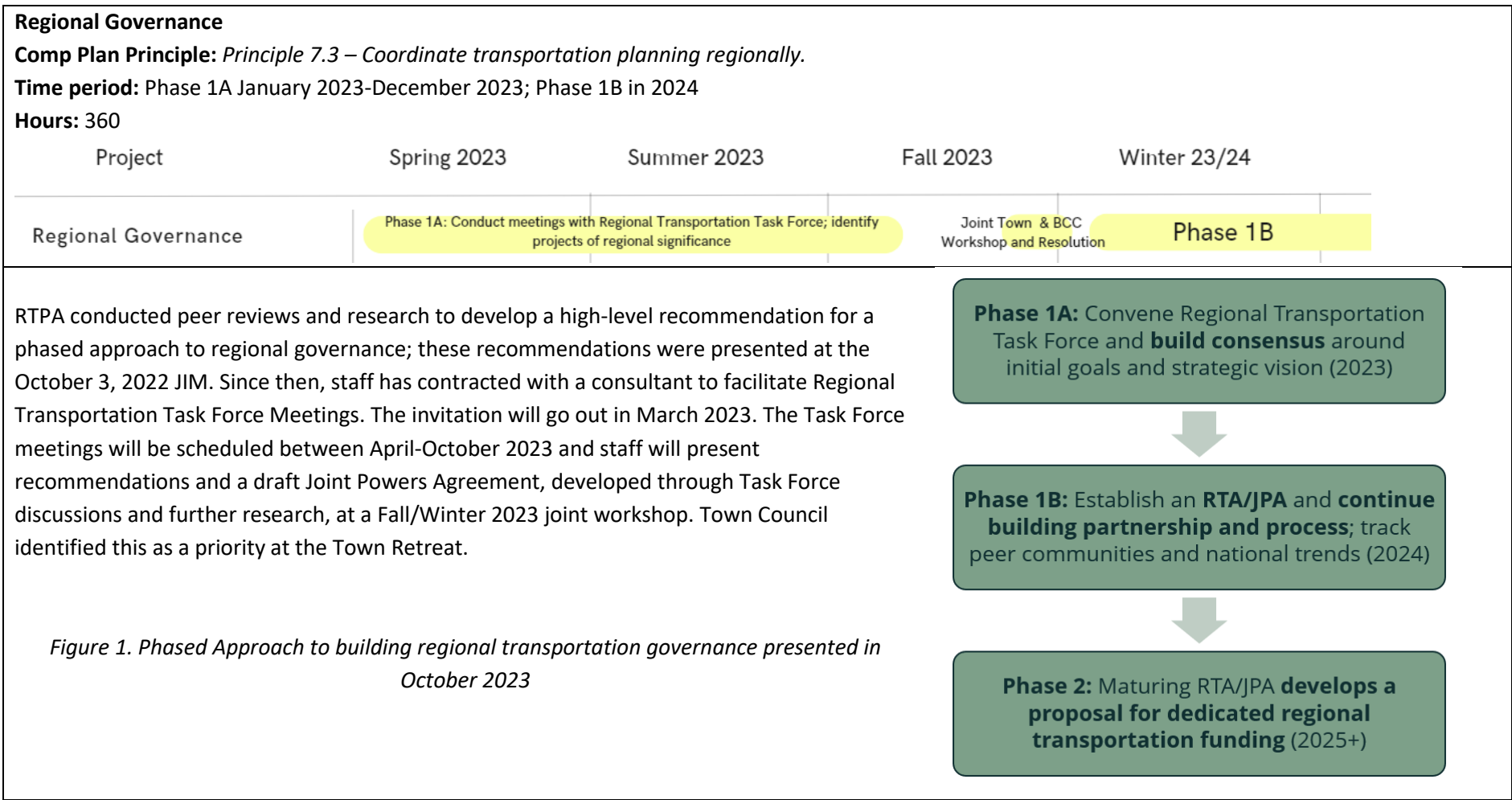
Town of Jackson: Same motion

RTPA- Workplan and Timeline



FY2024 New FTE: Special Projects Coordinator to support Commute Trip Reduction Program; Equity Task Force Recommendations; Emerging Mobility tactical activities; Trip Generation and Traffic Count Calibration

Introduction: The projects herein can be completed by the RTPA in FY2024; the time period covered is generally FY2024. The total hours are less than 2000 for projects that will commence during calendar year 2023. It is assumed that several projects will bring recommendations to a JIM meeting in late 2023 or early 2024 to guide the next workplan. The proposed FTE is not needed to complete this workplan, but a new FTE would allow the Town and County to continue to manage and evolve existing programs (e.g. bikeshare) and develop programs envisioned in Chapter 4 of the Integrated Transportation Plan (ITP), e.g. vanpools, ride-matching, guaranteed ride home. The proposed FTE would fulfill the responsibilities of the ‘Travel Demand Management Coordinator’ listed as an ‘Essential Action Item’ in the 2020 ITP update. Staff has indicated projects identified through the Council Workplan throughout this document. In addition to these projects and tasks, the RTPA is a subject matter expert on transportation planning and engineering and provides leadership and facilitation to the Transportation Advisory Committee (TAC) and Urban Systems (US) Committee.

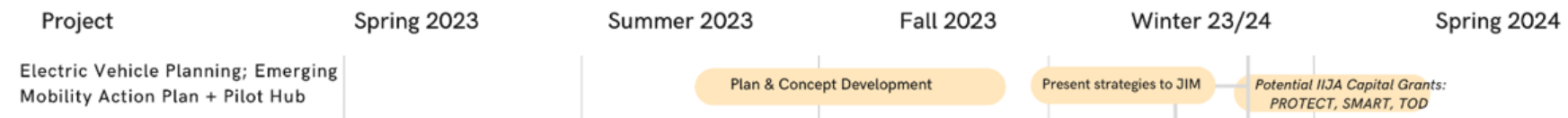


Emerging Mobility Action Plan and Mobility Hubs ('ITP Transportation Demand Management Plan', 2022 Joint Planning Workplan also referenced)

Comp Plan Principle: *Principle 7.1 – Meet future transportation demand with walk, bike, carpool, transit and micromobility infrastructure*

Time period: July 1, 2023- January 30, 2024

Hours: 200



This study will explore supply-side and demand-side strategies to promote more 'car free' trips in Jackson among residents, commuters and visitors. The proposed work will include tasks such as:

1. RTPA will convene a stakeholder group including but not limited to START Bus, Housing, Parks & Recreation, Travel and Tourism Board, and others to build consensus around the mobility features needed at locations such as Miller Park and Home Ranch. These may include digital and fixed wayfinding/kiosks, EV charging, queueing areas for for-hire or tour vehicles, among others.
2. Develop high-level strategies and steps to create mobility hubs or provide more car-free trips. Example strategies include improving coordination with non-profits or community services (e.g. Senior Center), exploring the next generation of bikeshare, developing an electric vehicle car-sharing program, or developing data standards and procurement policies that support coordination across all Town and County provided or contracted transportation services. Staff will present the most promising strategies at a JIM meeting in early 2024. Each strategy will include approximate program cost estimates and staffing needs to evaluate which strategies should be pursued, if any.

One outcome will be **a concept for a mobility hub** that (1) serves many residents, commuters and visitors and (2) delivers seamless, multimodal alternatives. The other outcome will be **a menu of strategic actions or programs** for the Town and County to facilitate shared mobility for various travel markets. Electric vehicles are a component of emerging mobility strategies, but to shift new travel demand to shared modes, we must consider how space is allocated, as Figure 2 at right illustrates. Town Council identified a Q1 2024 discussion of these strategies during the Retreat.

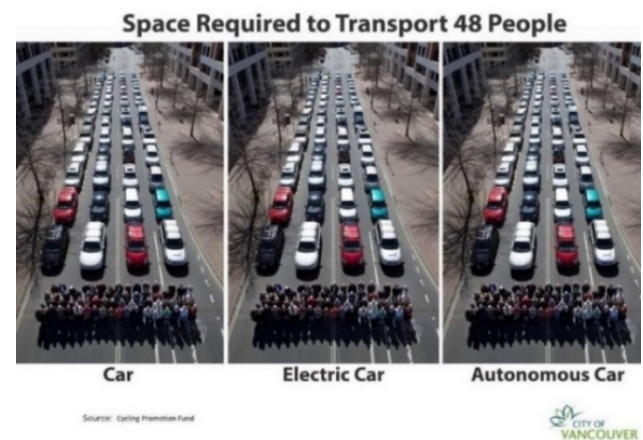
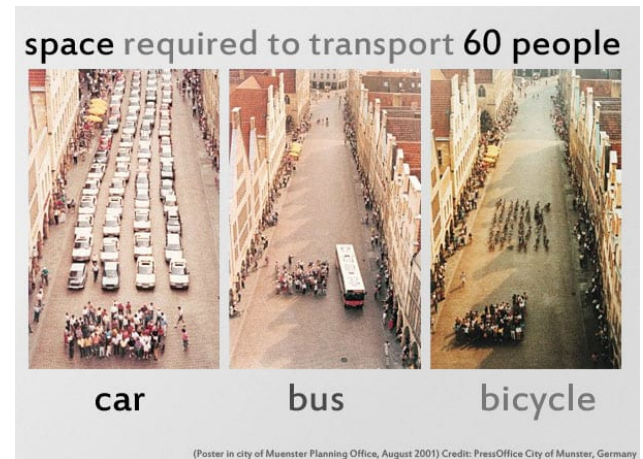


Figure 2: Widely shared City of Munster, Germany space illustration (2001, top) and City of Vancouver modification (May 2022)

Northern South Park, Cottonwood, South Park Loop Road Multimodal Transportation improvements

Comp Plan Principles and Policies: *Principle 7.1 – Meet future transportation demand with walk, bike, carpool, transit and micromobility infrastructure; Principle 7.3 – Coordinate transportation planning regionally; and Policy 7.3.e: Require development to provide for walking, biking, carpooling and transit*

Time period: July 1, 2023- April 30, 2024

Hours: 300

Project	Spring 2023	Summer 2023	Fall 2023	Winter 23/24	Spring 2024
Northern South Park Multimodal Transportation Improvements (mmSNaC)		Compile Existing Plans	30% Designs + PI	Joint Town & BCC Workshop and Resolution	Early 2024: Apply for Rural Surface Transportation Grant

The area between South Park Loop Road (north leg from Maverick to Middle School) and High School Road, and further extending down South Park Loop Road to Red House Road contains many priority projects for Town Public Works, Teton County Public Works, and Pathways. These priority projects include improvements to existing intersections and roads and new Pathway connections identified in the 2007 Pathways Master Plan. Staff has drafted a scope of work for a planning and design contract to envision the future of transportation in these corridors consistent with the goals of the Comprehensive Plan and best Transportation practices. Staff would then pursue a Rural Surface Transportation Grant in spring 2024 to fund the construction and repair of the facilities. The East-West Connector is identified as part of Capital Group 4 in the ITP, but an alignment for East-West Connector needs to be identified. The policy direction in the Integrated Transportation Plan is to maintain and upkeep existing facilities; replace, rehabilitate, and repair existing facilities; and systems operations and demand management before constructing new facilities. The ITP Capital Group approach and funding perspective will guide the planning, design, and prioritization of corridors in the project area.

The East-West connector and the North-South leg of South Park Loop Road would be County-funded improvements. For other projects in the Study Area, the RTPA will consult with Town and County staff on right-of-way ownership to propose a cost sharing agreement. Gregory Lane has been prioritized for design and construction by Town Council.

Staff's working 'shorthand' for this project study area, shown in Figure 3, is "Modernizing Mobility for Schools, Neighborhoods and Community", i.e. **mmSNaC**.

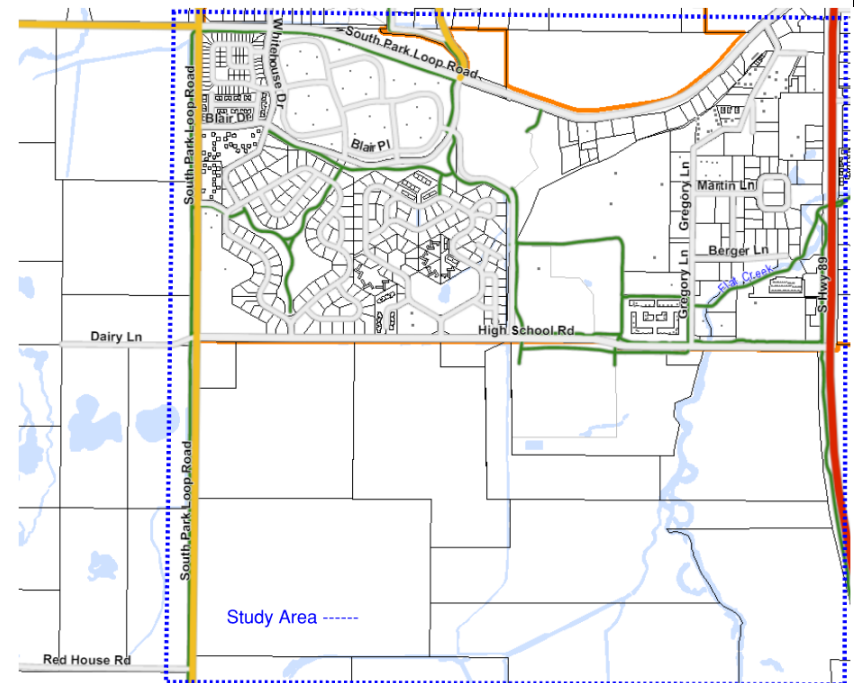


Figure 3. Project Study Area

JAC Airport Ground Transportation Study

Comp Plan Principle: *Principle 7.1 – Meet future transportation demand with walk, bike, carpool, transit and micromobility infrastructure*

Time period: present- December 30, 2023

Hours: 200



RTPA will serve as Project Manager for feasibility study of ground transportation service to the airport. START was awarded a planning grant through WYDOT. The consultant selection process is underway. The study will conclude by the end of 2023 with recommendations for an airport transportation service.

Working with WYDOT on Highway 22

Comp Plan Principle: *Principle 7.1 – Meet future transportation demand with walk, bike, carpool, transit and micromobility infrastructure*

Time period: ongoing

Hours: 200

Page 12 of the ITP states the following:

“...START and Teton County will work closely with WYDOT during project development of WY-22 between Jackson and WY-390 (see Major Capital Projects - Group 1 in Chapter 5) to explore the potential of dedicating new lane capacity to an exclusive bus [and/or] HOV (high occupancy vehicle) lane.

- Intersection prioritization. Design of the Y intersection and WY-22/WY-390 intersection will include signal and/ or lane prioritization for buses. Implementation of this design feature will require coordination with WYDOT during project development of the Major Capital Projects - Groups 1 & 2 respectively (see Chapter 5).”*

Furthermore, page 31 states **“The Town and County will work actively with WYDOT to ensure local multimodal transportation objectives are met in this corridor** and that a WY-22 modernization project advances as quickly as possible through the planning process into design and construction.” WYDOT will soon initiate the National Environmental Policy Act (NEPA) study; to date WYDOT has indicated they are in a pre-NEPA phase that includes surveying existing conditions. The NEPA study is the planning process, and WYDOT estimates a preferred alternative will be generated by late 2025. Once a preferred alternative is selected, the design process would begin.

For the upcoming planning process, WYDOT will form a 9 to 10-person stakeholder committee and invite adjacent landowners, Town, County, transit, and other community representatives to participate in that stakeholder group. WYDOT has also hired a Teton County liaison, Jeff Brown, who is based in Cheyenne and was formerly the statewide Highway Development Engineer.

WYDOT Highway 22 Continued

The RTPA will engage in the stakeholder group and communicate with Jeff Brown to communicate local multimodal transportation objectives. Ultimately many community stakeholders will have the influence to shape the alternatives in the NEPA process, and it should be noted that no one staff member can dictate the design alternatives.

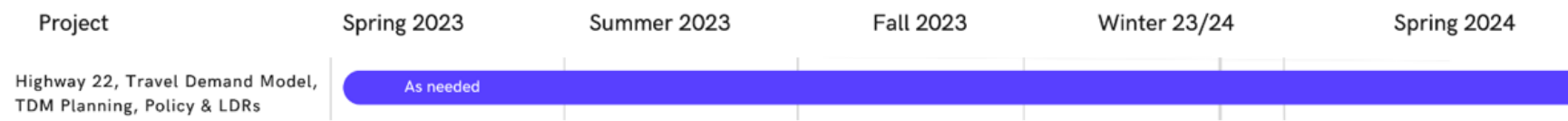
Notably, High-Occupancy Vehicle Lane enforcement legislation passed the Wyoming Senate and House in late February and was signed by Governor Gordon on February 27, 2023. This legislation was a critical step toward implementing HOV on Highway 22, and WYDOT Director Luke Reiner was highly influential in the bill’s passage.

Travel Demand Model, Travel Demand Management, Performance Measures, Planning Review Committees, Research Committees

Comp Plan Principle: *Principle 7.1, 7.2, and 7.3*

Time period: ongoing

Hours: 300



There are several ongoing or as-needed tasks that require 2-4 hours a week of time. These include overseeing the consultant updating the travel demand model, developing an annual transportation indicators report, and supporting Town and County planners as a Planning Review Committee member. This task also includes reviewing documents related to the Travel Demand Management components of the Grand Targhee Master Plan.

The RTPA was also invited to the Transportation Cooperative Research Program (TCRP) international panel regarding Fare Policies, Technologies and Structures. Panels typically consist of 10-16 representatives from across academia, industry, and the public sector to guide best practices reports for transit agencies. RTPA’s participation in this panel will be approximately 40 hours throughout FY2024 and will allow our region to access the latest research and best practices in fare payment as START initiates a fare payment study.

Safe Streets and Roads for All (SS4A) Action Plan Grant

Comp Plan Principle: *Principle 7.1 – Meet future transportation demand with walk, bike, carpool, transit and micromobility infrastructure*

Time period: Complete plan within 12 months of NTP from USDOT (estimated complete by January 30, 2024)

Hours: 100-125 hours



Teton County (lead applicant) in partnership with Town of Jackson received a \$480,000 Federal match (together with \$120,000 local Friends of Pathways contribution) to advance a safe systems approach (Figure 4) to traffic in Teton County. RTPA will support the Pathways Coordinator to develop a compliant Comprehensive Safety Action Plan. The safe systems approach is intended to reduce and eventually eliminate fatalities and serious injuries on roadways. Among other actions, a Federally-accepted SS4A Action Plan requires:

1. Outreach targeted to marginalized communities (low-income, non-English speaking households);
2. Identifying low-cost, high-impact technologies/strategies to deploy on various facilities;
3. Reviewing existing guidelines/standards, such as Town and County street design standards, to ensure safety for all is prioritized; and
4. Adopting a Vision Zero statement.

Teton County and Town of Jackson need an accepted Action Plan to be eligible for future SS4A capital funds that can fund projects in the Pathways Master Plan. Staff must scope the services needed to complete the program. Town Council identified this item as a priority for the upcoming year. More information will be brought to the JIM later in 2023. "Updated design standards for safe streets" is tentatively scheduled for Q1 2024 per the Town Retreat schedule. The Town Mobility Overlay will be part of this and is tentatively scheduled to be presented November 2023.



Figure 4. Safe System Approach (Source: USDOT, 2023)

Parking Study Charter Phase 3: Regional Parking and Park & Rides**Comp Plan Principle:** *Principles 7.1, 7.2, 7.3***Time period:** January 2024 – December 2024, once Regional Governance Phase 1A concludes**Hours:** 200 hours

The Joint Planning Department created a four-phase parking charter in 2016, and phases 1 and 2 have been completed. Phase 3 envisioned a Regional Study which would include evaluating park and rides. The third planned meeting for the Regional Transportation Task Force is to discuss Projects of Regional Significance, and staff will introduce Regional Parking and Park & Rides as a project of regional significance. Regardless of whether the Regional Transportation Task Force adopts the list, initiating Phase 3 of the Parking Charter is a priority action if Teton County and Town of Jackson seek to shift new travel demand to modes other than driving. This study will revisit elements of the Downtown Parking study to assess how parking in Jackson influences regional travel and parking demand. The study will include a holistic review of various regional strategies, policies, and projects and how they may combine – rather than any policy or project being implemented in isolation- to influence regional travel behavior.

Supporting Lincoln County in EV and Transit planning RAISE grant; supporting other regional EV Initiatives (advising as needed)

Comp Plan Principles: 7.1, 7.2, and 7.3

Hours: 80

RTPA assisted Lincoln County in drafting the narrative for their successful RAISE planning grant. Lincoln County was awarded \$1.7MM to plan transit and electric vehicle (EV) charging. RTPA has provided Lincoln County with sample scopes of work to hire consultants to evaluate transit maintenance facilities, park and rides, bus rapid transit, EV master planning, and others. RTPA will continue to assist Lincoln County to ensure their work is consistent with work in Teton County. There are also *discretionary EV community grants that could be useful for mobility hub improvements*. RTPA has met with Yellowstone Teton Clean Cities (YTCC), Town Public Works, County Facilities, Town Sustainability Coordinator, and Energy Conversation works, among others to discuss EV charging opportunities in the region. We will continue coordinating to ensure EV planning is coordinated and thoughtful. This could include an EV car-sharing program.

Figure 5. Lincoln County RAISE 2022 Fact Sheet



New Full-time Employee: Transportation Projects Coordinator

The ITP calls for a “Travel Demand Management Coordinator” or TDM Coordinator. The RTPA proposes a more general role that could support not only TDM programs, but a variety of transportation programs or projects. The RTPA drafted a job description that is under review by the County’s consultant to determine pay grade. *Projects may include* TDM programs contemplated in ITP, researching the need for Impact Studies and Impact Fees, supporting bike-sharing and car-sharing programs through research or program management, and supporting START and Pathways projects. Preliminary estimated cost, including healthcare and retirement benefits, is \$100,000 for FY2024.

This new position is **not required** to complete the work described above, but any programs that emerge from the work above (e.g. a vanpool program, an equity-based bike-sharing program, an EV car-sharing program, coordination with Senior Center on transportation alternatives) would require significant start-up and ongoing program management. These kinds of projects and programs could be directed by the new FTE.



Appendix: Council Workplan Calendar 2023-2024 with relevant meetings highlighted

COUNCIL WORKPLAN CALENDAR 2023				
MARCH	APRIL	MAY	JUNE	JULY
TOWN MTGS.	TOWN MTGS.	TOWN MTGS.	TOWN MTGS.	TOWN MTGS.
Begin Planning for Updates to Wasterwater Treatment Plant	Budget	License Plate Recognition Security Cameras	Equity Audit & Further Recommendations	Karns Meadow Master Plan
Wastewater Treatment Plant Construction Management		Incorporating Drone-Use Into Police Department	State Legislative Post-Session Debrief	Stormwater Management Program
Joint Department Funding/Governance Proposal		Energy Audit RFP & Green House Gas Inventory		Support for Women's Reproductive Rights
		Updates to Public Works Fees		
		Budget		
JIM	JIM	JIM	JIM	JIM
Transportation Work Plan	Long-Range Planning Work Plan & Indicator Report	START JPA	Workforce Housing Mitigation	Workforce Housing Mitigation (Mtg. 2)
Housing Mitigation Policy Contract Amendment	Housing Supply & Work Plans	Budget	Rec Center Fee Policy & Schedule	
	Budget		Budget	
	START Van Pool/Ride Matching, Service to Airport/GTNP - Budget			
	New Housing Partnership Developments & Land Acquisition			
AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
TOWN MTGS.	TOWN MTGS.	TOWN MTGS.	TOWN MTGS.	TOWN MTGS.
State Legislative Approach & Agenda	Consideration of Town Org. Structure & Efficiency	Compliance Issues for FTA Grants	Town Mobility Overlay	Future staffing for all departments
Update to Anti-Discrimination Ordinance adding Anti-Bias Crimes	Council Retreat Planning & Execution	Urban Forest Ord. Update & Program Policy Procedures	Ecosystem Indicator Project	Total Compensation Review
	Design & Construction of Gregory Lane	Re-evaluation of large bldg/2:1 Workforce Bonus	Water Quality & Setting New Drinking Water Regs	Town Sustainability Plan
JIM	JIM	JIM	JIM	JIM
Cow Pasture 1 & 2 Softball Field Replacement	Design & Construction of Stilson	Safe Streets for All Safety Action Plan	Workforce Housing Mitigation (Mtg. 3)	Regional Gov. & Transportation Planning Process & Agreements

COUNCIL WORKPLAN CALENDAR 2024			
QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4
Town Employee Housing Strategy	Assisted Living Housing Program	Design of E. Broadway, N. Cache, Maple Way?	Water Quality & Setting Regs for Drinking Water (Mtg. 2)
Updated Design Standards for Safe Streets	Policy Manual Update	Continued Growth/Demand for EMS	Design & Construction of Gregory Lane (Mtg.3)
Planning Stormwater Management Program	Adding Fees for Services to Offset Costs	Fire/EMS Level of Service & Setting Expectations	
Budget	Policy Manual Update	Volunteer Career/Staffing Model & Dynamics	
	Equity Task Force Next Steps		
	Design & Construction of Gregory Lane		
	Northern South Park		
	Budget		

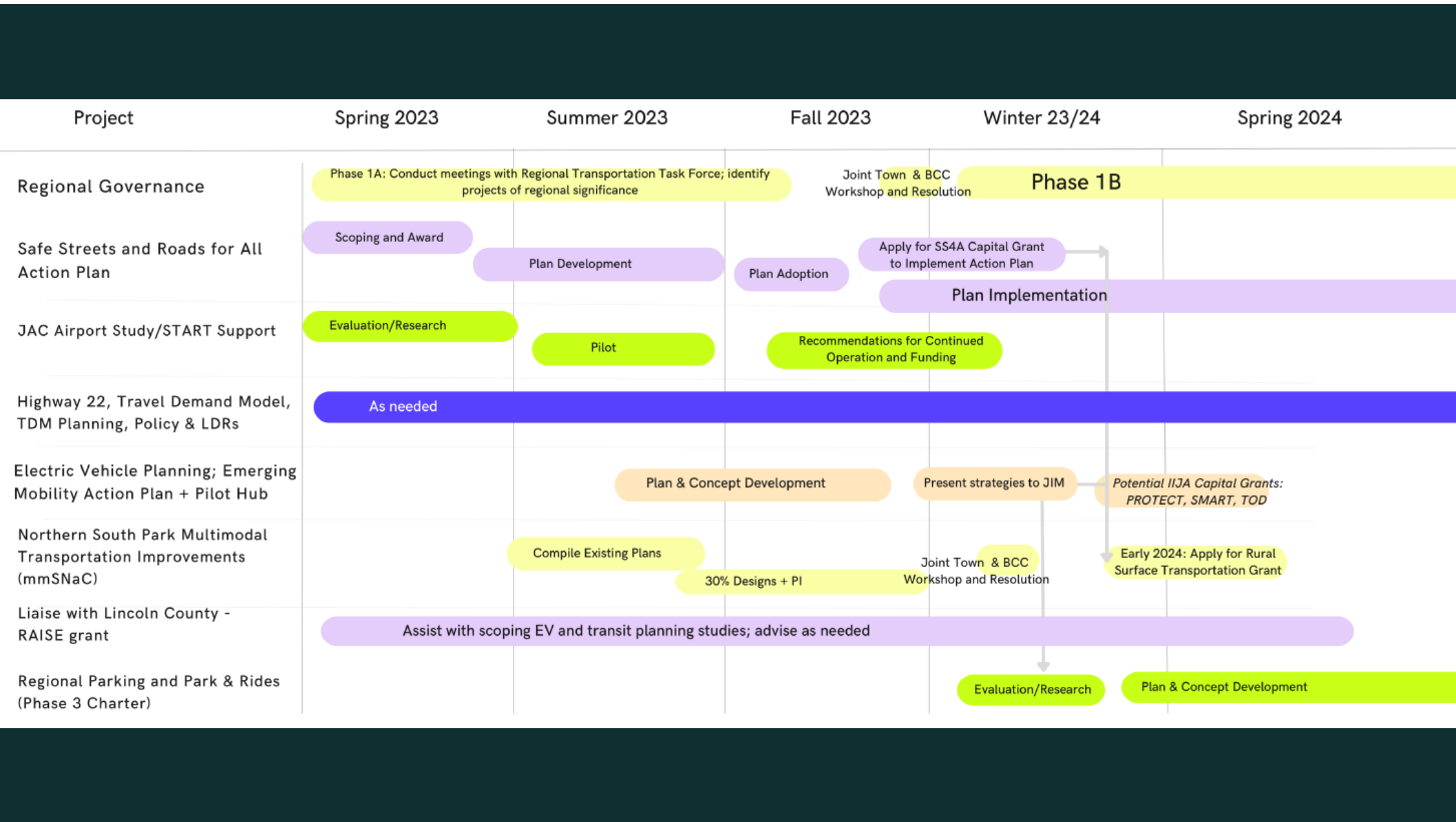


FY2024 Transportation Workplan

Joint Information Meeting

March 6, 2023

Charlotte Frei, PhD, PE



Regional Governance

Timeline: Phase 1A 2023; Phase 1B 2024

FY 2024 Hours: 360

Budget requested: \$90,000

Outcomes:

Recommendations for future phases and a draft Joint Powers Agreement or other appropriate agreements, developed through Task Force discussions and further research. Staff will present Fall/Winter 2023 joint workshop

Phase 1A: Convene Regional Transportation Task Force and **build consensus** around initial goals and strategic vision (2023)



Phase 1B: Establish an **RTA/JPA** and **continue building partnership and process**; track peer communities and national trends (2024)



Phase 2: Maturing RTA/JPA **develops a proposal for dedicated regional transportation funding** (2025+)

Emerging Mobility Action Plan and Mobility Hubs

Timeline: July 2023 – January 2024

FY 2024 Hours: 200

Requested budget: \$80,000

Outcomes:

1. a concept for a mobility hub that (a) serves many residents, commuters and visitors and (b) delivers seamless, multimodal alternatives.

2. Menu of tactical actions or programs for the Town and County to facilitate shared mobility for various travel markets.

Comp Plan, ITP, START Routing Plan, Pathways Master Plan provide numerous goals, objectives, strategies, and tactics to build from.



	WHAT	HOW	FOR WHOM
HIGH-LEVEL	Goals	Strategies	
DETAILED	Objectives	Tactics	



Image Source: bicyclenetwork.com.au

mmSNAC: Modernizing Mobility for Schools, Neighborhoods, and Community

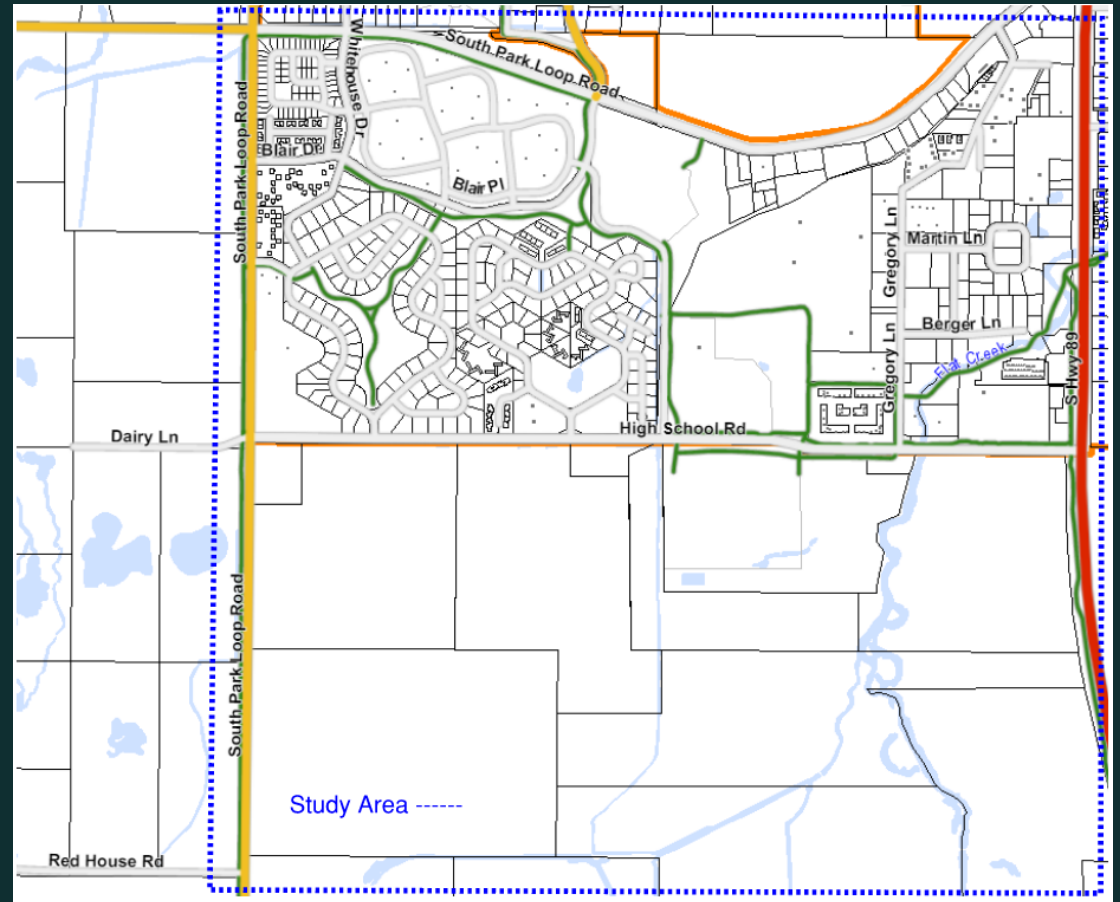
Timeline: July 2023 – April 2024

FY 2024 Hours: 300

Requested budget: \$300,000

Outcome:

Planning and design documents, and associated cost estimates, suitable to pursue Rural Surface Transportation Grant (RSTG) capital funding for improvements consistent with ITP.



JAC Airport Ground Transportation Study

Timeline: present – December 2023

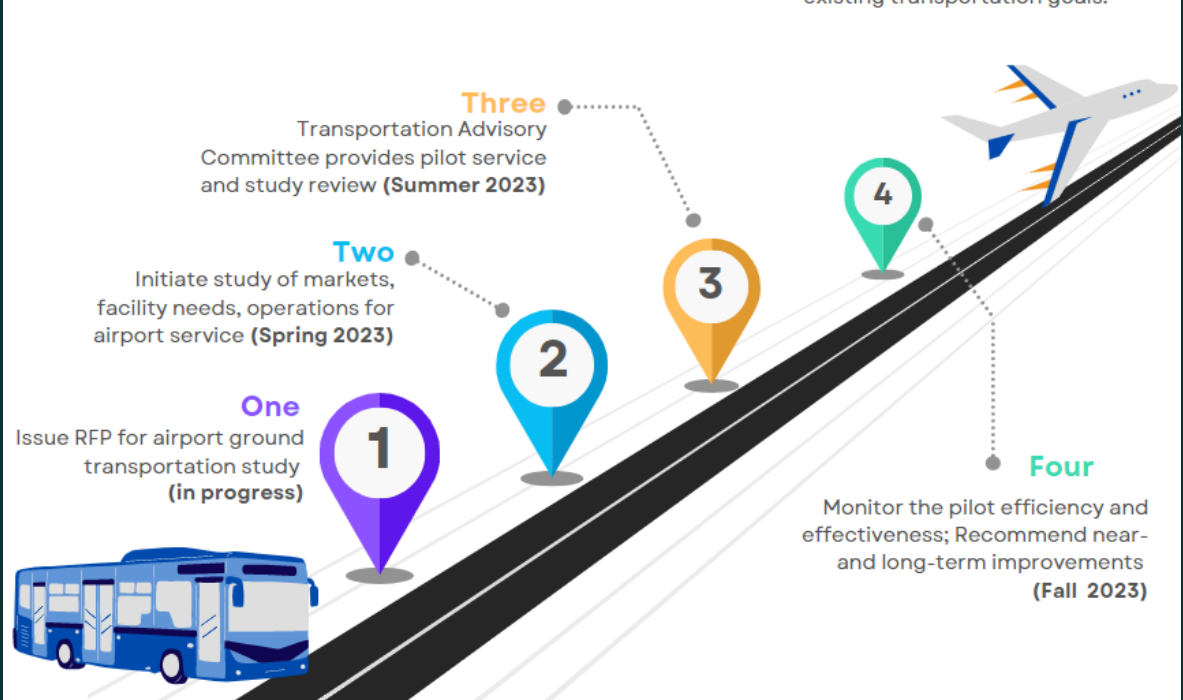
FY 2024 Hours: 200

Funded via FTA Grant, 20% match from Town, County and Airport (\$10,000 each)

Outcome:

Recommendations for ground transportation serving JAC Airport

Airport Service Study and Pilot Roadmap



The image above developed for November 2022 Airport Board Meeting Discussion

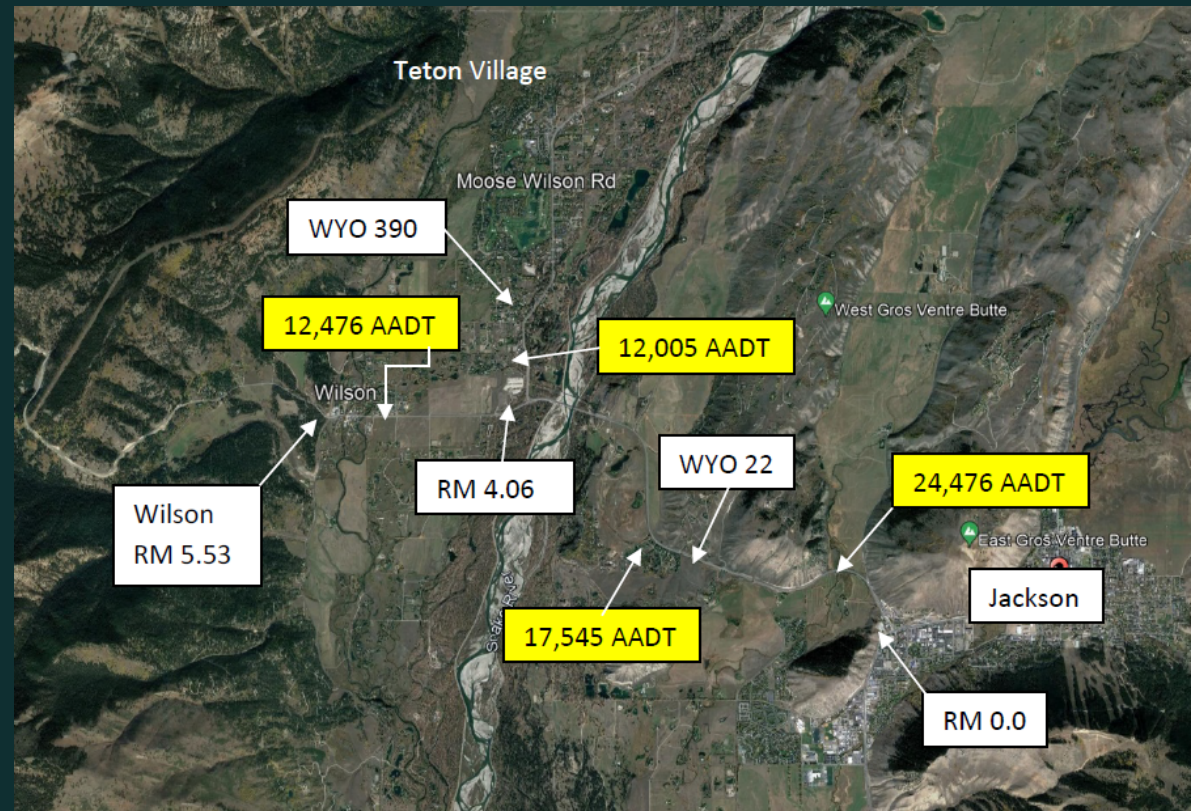
Highway 22 Involvement

Time period: ongoing

Hours: 200

Budget: indirectly, Travel Demand Model/Traffic Model maintenance, \$60,000

Outcomes: engagement with WYDOT on Highway 22 NEPA study: "WYO22 Jackson to Wilson Corridor Study"



AADT on WYO22, Source: WYDOT August 17, 2022

Various – planning review, performance measures, TAC and US committees

Timeline: ongoing

Hours: 300

Budget requested: \$22,000 for Regional TIP and Performance Measures reporting support

Outcomes:

1. Coordination between Town and County departments planning, designing, and managing land use and transportation.
2. Improved awareness of existing conditions and opportunities for improvement.

Safe Streets and Roads for All Action Plan Grant

Time period: anticipated through January 2024

Hours: 125

Budget: in the Pathways Coordinator budget, \$600,000 combination of 20% private donation and 80% Federal funds

Outcomes:

A Comprehensive Safety Action Plan identifying projects, policies, and strategies to improve safety for all road users



Image Source: USDoT Safe System Approach (2023)

Parking Study Phase 3

Time period: January-December 2024

Hours: 125

Budget: \$115,000

Outcomes:

A Comprehensive Safety Action Plan identifying projects, policies, and strategies to improve safety for all road users



Supporting/Liaising with Lincoln County RAISE grant

Time period: through July 2024

Hours: 80 or fewer

Budget: None

Outcomes:

Lincoln County will issue planning study scopes related to community and fleet EV charging and public transportation. Coordination on these studies improves the likelihood that the study results will consider – and possibly advance-- the status of related work in Teton County and Town of Jackson.

RAISE Grants

Rebuilding America Infrastructure with Sustainability and Equity



U.S. Department
of Transportation

Rural, Planning

Lincoln County Rural Planning Project

County of Lincoln
Wyoming

Grant Funding: \$1,790,000

Estimated Total Project Costs: \$1,790,000

Project Description:

This planning project will develop a plan to improve several aspects of transportation in Wyoming including upgrading their freight rail system, providing electric vehicle charging stations, and improving public transit.

Project Benefits:

The project will find areas ripe for freight rail access, determine optimum locations for charging and/or fueling stations for anyone utilizing electric vehicles, and study the addition of public transit for the rural area. The project will have clear safety benefits by promoting a modal shift from trucks to freight rail, which will reduce the fatalities and injuries on the local highways. The project will promote electric vehicle charging stations and encourage reduced vehicle miles traveled.



Supporting/Liaising with Lincoln County RAISE grant

Time period: through July 2024

Hours: 80 or fewer

Budget: None

Outcomes:

Lincoln County will issue planning study scopes related to community and fleet EV charging and public transportation. Coordination on these studies improves the likelihood that the study results will consider – and possibly advance-- the status of related work in Teton County and Town of Jackson.

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New FTE: Transportation Projects Coordinator

Timeline: TBD

Hours: Full-time

Budget: \$100,000

Outcome:

A Transportation Project Coordinator would take ownership of Chapter 4 of the ITP (Travel Demand Management) and could support program planning and implementation, *e.g.*, vanpooling, bike-sharing, and car sharing.

