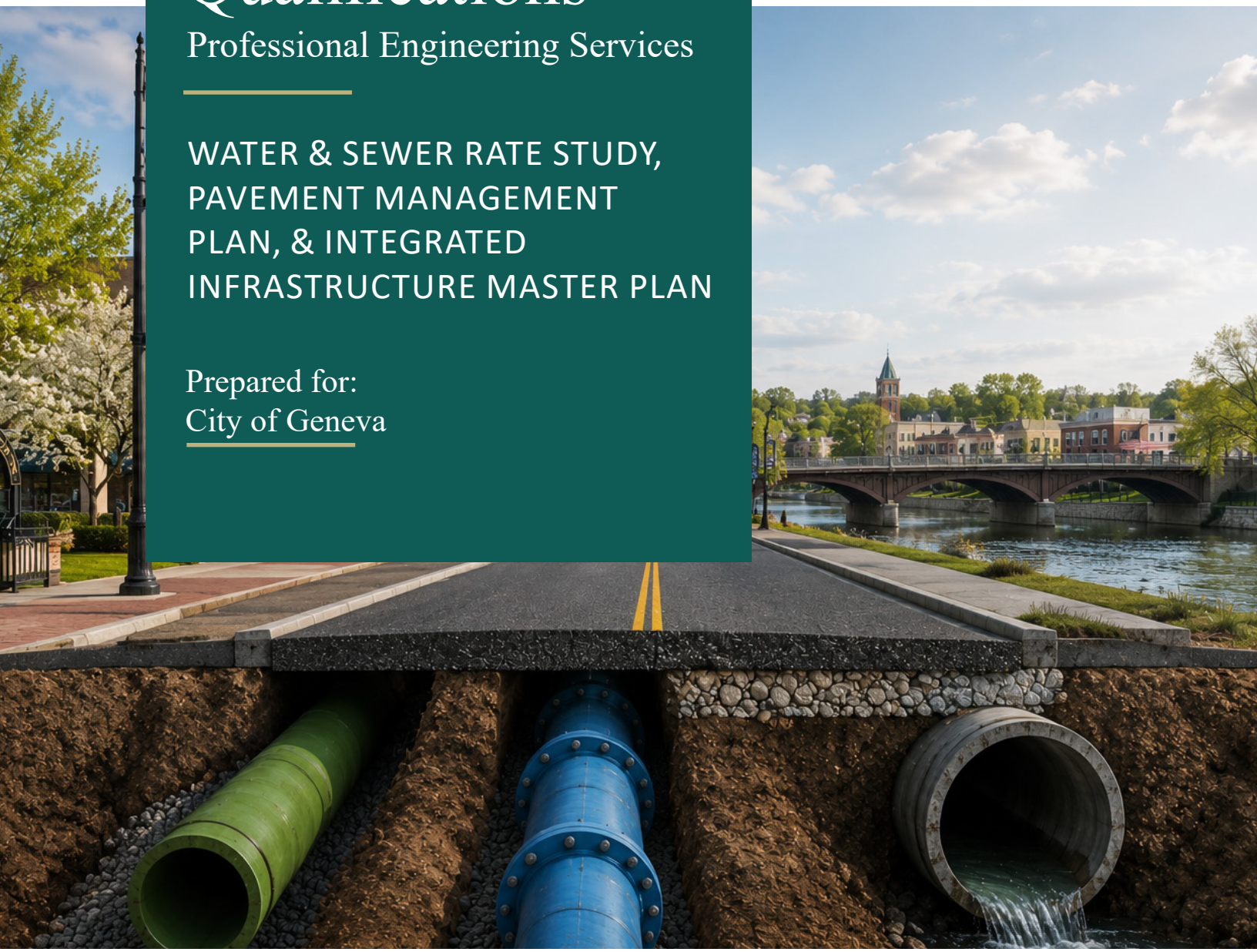
JULY 2, 2026

Request for Qualifications

Professional Engineering Services

WATER & SEWER RATE STUDY, PAVEMENT MANAGEMENT PLAN, & INTEGRATED INFRASTRUCTURE MASTER PLAN

Prepared for:
City of Geneva



ENGINEERING ENTERPRISES, INC.

630.466.6700 • www.eeiweb.com

Submittal Letter

July 2, 2026

Ms. Alex Voigt
City Administrator
City of Geneva
22 S. First St. Geneva, IL 60134

Re: Professional Engineering Services for 2026 Water and Sewer Rate Study, Pavement Management Program, and Integrated Infrastructure Master Plan

Dear Ms. Voigt,

The Engineering Enterprises, Inc. (EEI)/Stantec team, having worked together on multiple infrastructure planning, rate studies, and funding applications before, is ready to assist the City of Geneva in advancing the 2026 Water and Sewer Rate Study, Pavement Management Plan (PMP), and Integrated Infrastructure Master Plan (IIMP) with a coordinated, implementation-focused approach. We understand the City is seeking a planning framework that connects financial strategy, infrastructure needs, pavement management, stormwater priorities, and long-term capital programming into one actionable roadmap.

- **One Integrated Capital Plan** – The project approach is built around Geneva's goal of combining the rate study, PMP, and IIMP into a unified framework. Our work will connect financial analysis, infrastructure condition, lifecycle needs, and implementation sequencing to support a coordinated Years 1–10 CIP and long-term Years 11–30 planning framework. EEI has successfully delivered this type of integrated planning framework for the City of Elgin and is currently applying the same coordinated approach for the Village of Carpentersville.
- **Financially Grounded, Implementation-Ready Recommendations** – The team will pair utility financial analysis with municipal infrastructure planning so rate, funding, and capital recommendations are practical, defensible, and aligned with Geneva's water, sanitary sewer, storm sewer, pavement, and long-term renewal priorities.
- **Coordinated Improvements that Maximize Value** – As described in our project approach, EEI will evaluate roadway, water, sanitary sewer, and storm sewer needs to identify sequencing efficiencies, reduce redundant construction, minimize disruption, and maximize the value of each capital dollar. Given the City's ownership of its electric utility, EEI can also coordinate planning efforts with the Electrical Division if desired.

EEI understands the importance of this effort to Geneva's long-term financial sustainability, infrastructure reliability, and capital planning. We appreciate the opportunity to submit our qualifications and look forward to helping the City develop a clear, coordinated, and actionable plan.

Respectfully submitted,
ENGINEERING ENTERPRISES, INC.

Michele L. Piotrowski

Michele L. Piotrowski, PE, LEED AP
Principal-In-Charge

Christopher Walton

Christopher R. Walton, PE
Project Manager / Point-of-Contact
(630) 466-6771
cwalton@eeiweb.com

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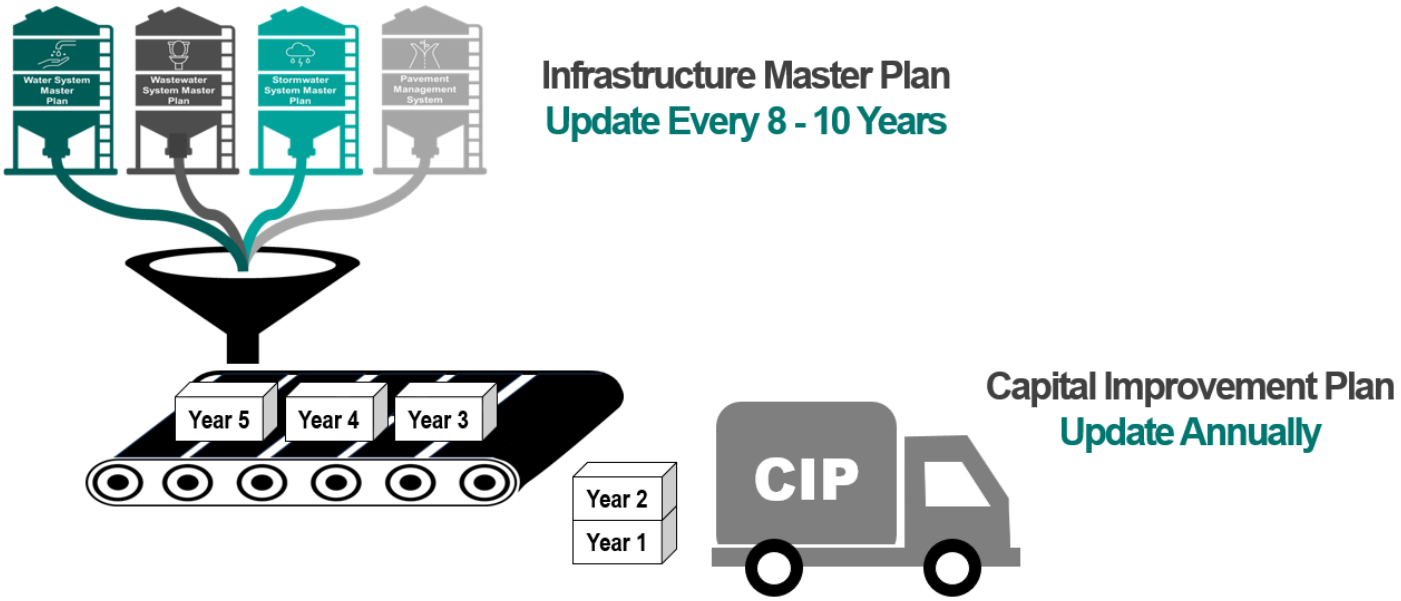
1 Firm Information

2 Project Personnel & Experience

3 Project Approach

4 Resumes

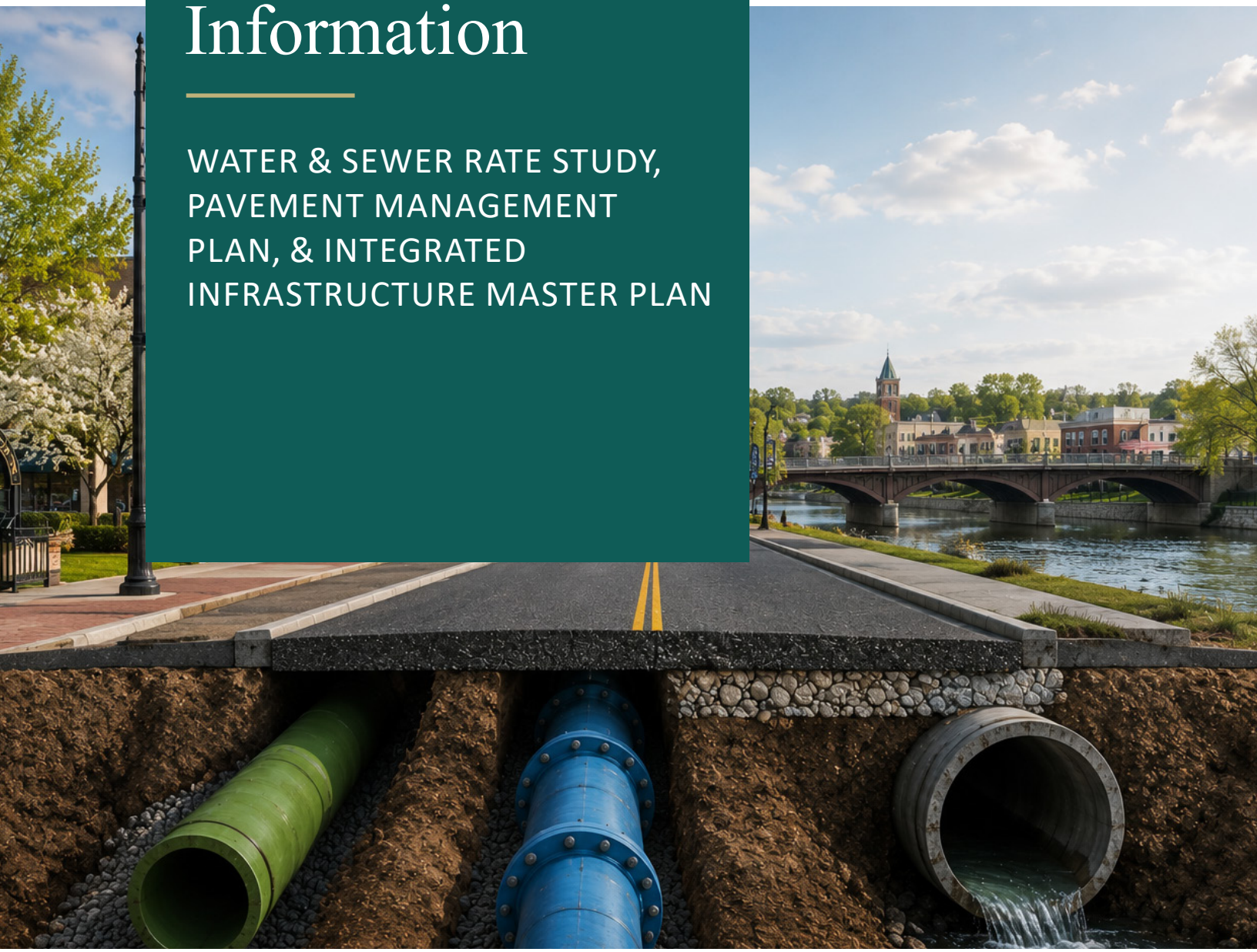




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Firm Information

WATER & SEWER RATE STUDY, PAVEMENT MANAGEMENT PLAN, & INTEGRATED INFRASTRUCTURE MASTER PLAN



ENGINEERING ENTERPRISES, INC.

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Firm Information

Engineering Enterprises, Inc. (EEI), is a highly reputable, Illinois-licensed, consulting engineering firm that has been providing award-winning services to public agencies throughout northern Illinois since 1974. With over 80 experienced firm members, including licensed professional civil engineers, land surveyors, and support team members, EEI offers a full range of services for planning, design, and construction of infrastructure projects, as well as grant and funding assistance.

Our business philosophy is centered around our commitment to quality, service, and value, and we employ a team approach from project initiation to completion. Each project is assigned a project manager and a team with experience and qualifications that match the needs of the project and client. We also have other specialists available for additional assistance whenever necessary. Our current staffing levels ensure that a well-qualified project team will be dedicated to your project for its entire duration.

Led by talented leaders, EEI is continually growing to better service our clients in all aspects of consulting engineering. Our ability to meet deadlines and budget requirements is reflected in the fact that over 95% of our work is for repeat clients. We attribute our return business to the personal commitment of professionalism to work and the relationships EEI has developed with our clients. Our aim is to win clientele trust and satisfaction every time.

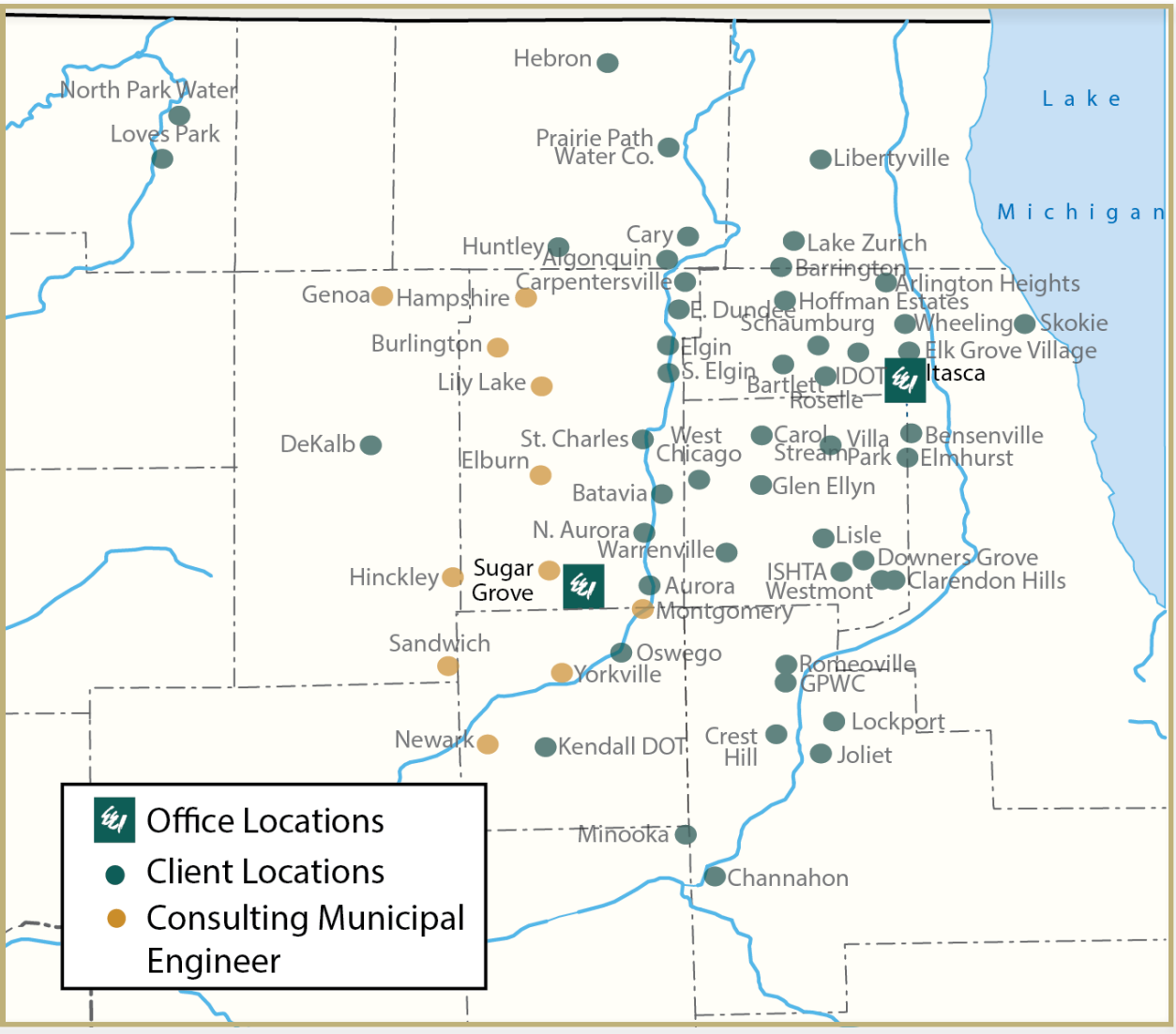
52
Years of Business

80+
Employees

2
Office Locations

60+
Client Locations

29
Project Awards



Firm Information

Our firm and hard working staff have been recognized with honors and awards* from several different professional organizations, such as the American Council of Engineering Companies of Illinois (ACEC-IL), American Public Works Association (APWA), American Water Works Association (AWWA) and the National Society of Professional Engineers (NSPE).

2026

ACEC-IL Special Achievement Award
Bartlett Excess Flow Challenges

2025

ACEC-IL Honor Award
ACEC-IL Judge's Choice: Water Resources
ACEC-National Recognition Award
Carpentersville Lead Service Line Replacement

2024

APWA-FVB Project of the Year Award
APWA-CMC Project of the Year Award
New Montgomery Public Works Facility

APWA-FVB Project of the Year Award
City of Batavia Water Treatment Plant Modifications

**Partial List*

In-House Services Capabilities

WATER • WASTEWATER • STORMWATER MANAGEMENT • TRANSPORTATION
CONSTRUCTION MANAGEMENT • LAND SURVEYING • GIS AND MAPPING
MUNICIPAL CONSULTING

For detailed information regarding our in-house services, visit our service pages:



LEADERSHIP TEAM:

Jeffrey W. Freeman, PE, CFM, LEED AP | Chief Executive Officer
Bradley P. Sanderson, PE | Chief Operating Officer / President
Denise M. Migliorini | Chief Finance Officer / Vice President
Stephen T. Dennison, PE | Vice President
Julie A. Morrison, PE | Vice President
Michele L. Piotrowski, PE, LEED AP | Vice President

OFFICE LOCATIONS:

Sugar Grove, Illinois | Corporate Office
52 Wheeler Road

Itasca, Illinois | Branch Office
555 Pierce Avenue, Suite 105

OUTSTANDING SERVICE • EVERY CLIENT • EVERY DAY

Firm Information

Brief History of In-House Municipal Rate Study Services

EEI has a long history of supporting municipal clients with rate study services as part of our in-house municipal engineering and capital planning practice. Our team connects utility revenue needs with infrastructure condition, capital improvement priorities, regulatory obligations, debt service, reserve policies, and community affordability. This integrated approach results in practical recommendations that reflect how municipalities operate, fund, maintain, and implement water, sanitary sewer, and related infrastructure programs.

Financial Capability

EEI is a privately owned small business with three executive members, six shareholders, and two office locations. Founded 52 years ago, EEI maintains a strong financial position supported by consistent revenue and personnel growth, disciplined financial management, and a diversified client base across municipal, transportation, environmental, and land surveying disciplines. The firm demonstrates long-term stability through sound budgeting, cost control, and strategic reinvestment in staff, technology, and operations. EEI successfully manages projects of varying size and complexity while maintaining adequate cash flow and liquidity. We consistently meet financial obligations, including payroll, vendor payments, and project-related expenses, and our accounting systems support accurate reporting and compliance with applicable standards. EEI also maintains appropriate insurance coverage, long-standing banking relationships, and access to lines of credit, enabling us to confidently undertake new assignments while continuing to deliver high-quality services.

Regulatory Actions and Litigation

EEI has been involved in limited litigation throughout the firm's history. From time to time, the company has been subject to routine claims, inquiries, or legal proceedings that arise in the normal course of business. In a few instances, owners, developers, or homeowners have attempted to include EEI in suits related to a contractor's failure to comply with applicable laws, regulations, or safety procedures. Management monitors these matters closely, reports potential issues to EEI's insurers, and takes appropriate action to mitigate risk. EEI continues to operate in compliance with applicable laws and regulations and remains committed to maintaining strong compliance practices, including regular review of procedures and training to help prevent future incidents.

EEI has not received citations for violations from federal, state, or local agencies and has not been involved in regulatory actions. There is no pending litigation to report that would have a significant impact on the company's financial position, operations, or cash flows. EEI maintains significant assets and appropriate professional liability insurance limits. The firm's claim history has been low, resulting in insurance premiums that remain low compared with firms of similar size and disciplines.

Insurance Coverage

EEI maintains all insurance coverage required and applicable to the services contemplated for this engagement, including professional liability, commercial general liability, automobile liability, workers' compensation, employers' liability, and cyber liability insurance, as appropriate. Policies are maintained through reputable carriers and structured to support the scope, scale, and risk profile of professional consulting services. Certificates of insurance and policy endorsements can be provided upon request.

Stantec Firm Information

About the Firm

Stantec, a corporation founded in 1954, provides professional design and consulting services in engineering, architecture, planning, surveying, geotechnical, environmental sciences, construction management, project management, and more. Continually striving to balance economic, environmental, and social responsibilities, we are recognized as a world-class leader and innovator in the delivery of sustainable solutions. The Stantec community unites more than **32,000 employees working in over 450 locations across the globe** offering a wide range of services to improve communities.

Our local strength, knowledge, and relationships, coupled with our world-class expertise, have allowed us to go anywhere to meet our clients' needs in creative and personalized ways. With long-term commitment to the people and places we serve, Stantec has the unique ability to connect to projects on a personal level and advance the quality of life in communities across the globe.

Main Office
Stantec Tower
10220-103 Ave. NW
Edmonton, Alberta,
Canada T5J 0K4
(780) 917-7000

Local Office
584 West Fifth Ave.
Naperville, Illinois
60563
(815) 601-4872

Project Lead Office
410 17th St., Ste 1400
Denver, Colorado
80202
(303) 295-1717

72
Years in Business

Stantec's Financial Consultants

As part of our Management & Technology Consulting (MTC) sector, our Financial Consultants specialize in providing financial analysis, rate studies and associated analyses to more than **50 local governments in Illinois and over 400 communities throughout the United States**, with a strong emphasis in ratemaking and financial services for utilities. Our holistic understanding of utility management provides our clients with implementable solutions to the challenges facing local governments. This foundation has made us who we are today – a trusted source to our clients in providing independent and objective financial management services to local governments and utilities throughout the country. You can be assured that our team will develop comprehensive and balanced solutions tailored for your situation.

Firm Principals

President & CEO
Gord Johnston

EVP & CFO
Vito Culmone

EVP & CGIO
John Take

EVP & COO N. America
Susan Reisbord

Rate Studies	
• Water/Sewer/Reclaimed	• Stormwater
• Electric & Natural Gas	• Solid Waste & Recycling

Cost-of-Service Analysis	
• Wholesale/Outside-City Rates	• Regionalization Studies
• Interlocal Agreements	• Customer Class Allocations

System Development Fees / Capacity Charges	
• Utilities & Other Services	• Fee/Charge Structure
• Expert Witness Services	• Development Policies

Financial Planning & Capital Funding	
• Policies, Targets & KPI's	• Demand Forecasting
• Bond Feasibility Studies	• Project Funding Strategies

Benchmarking	
• Database of 500+ Entities	• Key Financial Metrics
• Audited Financials & Rates	• Custom Group Comparisons

Affordability	
• Actual Bills & Incomes	• Regulatory Support
• Multiple Metrics & Thresholds	• Assistance Programs

Strategy & Management	
• IT Planning & Implementation	• O&M and CIP Optimization
• Strategic Plans	• Performance Measures
• Asset Management	• Level of Service Development
• Business Process Mapping	• Real Estate Advisory Services

Stantec Firm Information

Financial Capability

Stantec Inc. is a publicly traded entity listed on the New York Stock Exchange (Symbol: STN) and the Toronto Stock Exchange (Symbol: STN). We are required to be financially stable in order to maintain these listings, and we are required to adhere to the Internal Control – Integrated Framework issued by the Committee of Sponsoring Organizations of the Treadway Commission "(2013 framework)" (the COSO criteria). We are subject to ongoing independent audits that prove our financial stability and credit worthiness. For a complete view of our audited financial statements, visit the Financial Reports & Filings section of our website. Please note that Stantec Inc.'s operating subsidiaries and affiliates (e.g., Stantec Consulting Services Inc.) are not publicly traded but are owned and/or controlled by Stantec Inc. Stantec Inc.'s financial statements are consolidated to include its subsidiaries and structured entities that are controlled, but do not necessarily include all affiliates.

Regulatory Actions & Litigations

Stantec has been subject to a number of inspections and related matters concerning environmental, labor and occupational health and safety laws and regulations, some of which have resulted in the issuance of citations or orders. In some instances, a government agency may have attempted to find Stantec in violation as a result of another contractor's failure to comply with applicable laws and regulations. Importantly, Stantec has not received any final citations for serious, willful or repeat violations of any federal, state or provincial environmental, labor or any occupational health and safety laws and regulations. In each instance, Stantec cooperated fully with the applicable regulatory agency towards a prompt resolution. Furthermore, Stantec has taken proactive steps to review and update its practices and procedures to prevent future incidents from occurring.

There are no unsatisfied judgments, or arbitration awards outstanding against Stantec. Stantec does have some legal proceedings, lawsuits, or claims pending. These are a normal part of professional services industries. All have been reported to Stantec's insurers who are in the process of adjusting/managing them. None will have a material effect on the financial position of the company or its ability to undertake this assignment. Perhaps of greater comfort to our clients is the fact that Stantec seeks to deal with client concerns and claims promptly and fairly through its Risk Management group. As a public company, Stantec has substantial assets and maintains a high professional liability insurance limit. Stantec's claims history has resulted in relatively low insurance premiums when compared with firms of similar size and character.

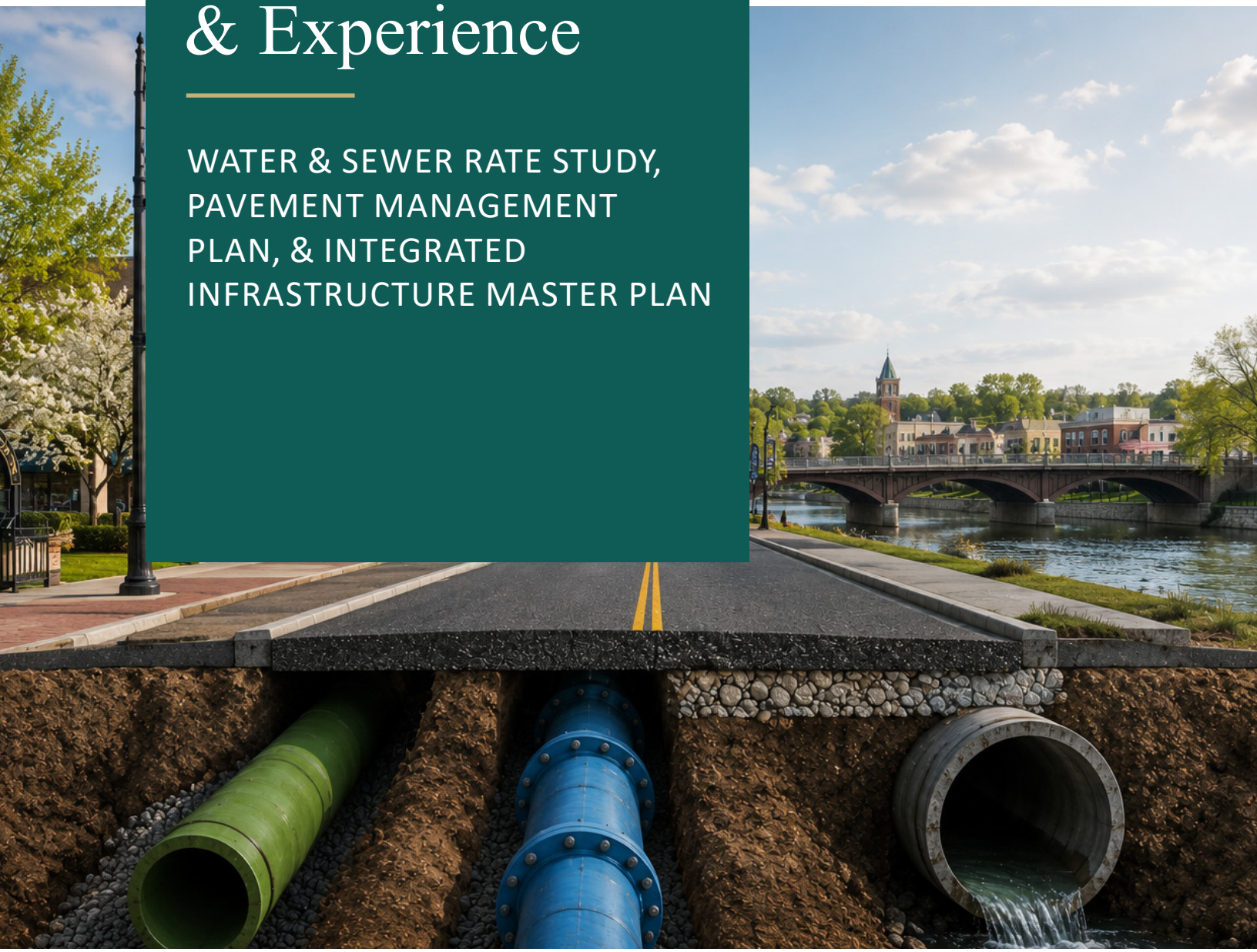
Insurance Coverage

Stantec maintains all insurance coverage required and applicable to the services contemplated for this engagement. Coverage includes as appropriate, professional liability, commercial general liability, automobile liability, workers' compensation, employers' liability, and cyber liability insurance. These policies are maintained through reputable carriers and are structured to support the scope, scale, and risk profile of professional consulting services. Certificates of insurance and policy endorsements can be provided upon request.

2

Project Personnel & Experience

WATER & SEWER RATE STUDY, PAVEMENT MANAGEMENT PLAN, & INTEGRATED INFRASTRUCTURE MASTER PLAN

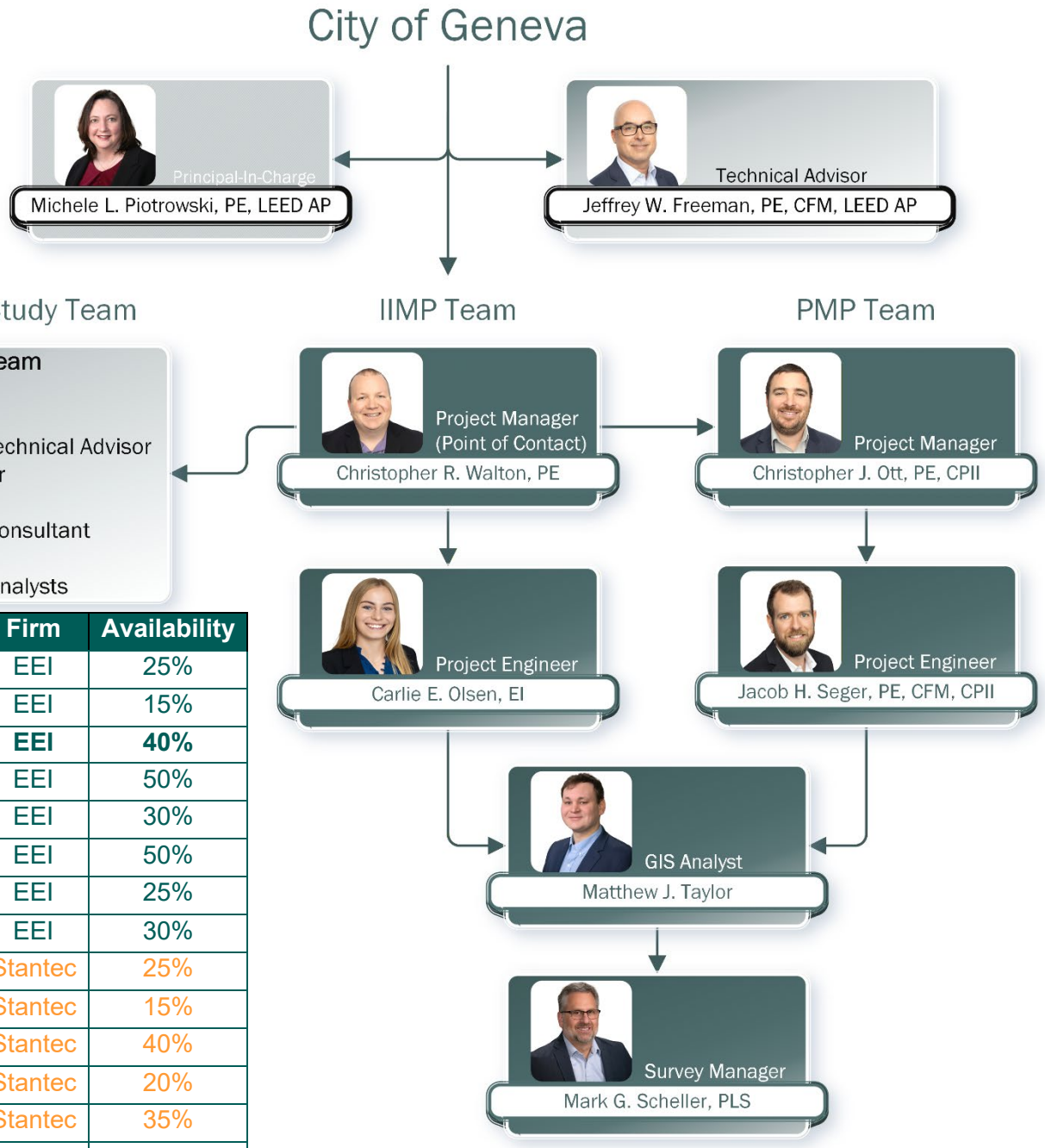


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Project Team

See Section 4 for the Project Team's Resumes



Name	Firm	Availability
Michele L. Piotrowski, PE, LEED AP	EEI	25%
Jeffrey W. Freeman, PE, CFM, LEED AP	EEI	15%
Christopher R. Walton, PE (Point of Contact)	**EEI**	**40%**
Carlie E. Olsen, EI	EEI	50%
Christopher J. Ott, PE, CPII	EEI	30%
Jacob H. Seger, PE, CFM, CPII	EEI	50%
Mark G. Scheller, PLS	EEI	25%
Matthew J. Taylor	EEI	30%
David Hyder	Stantec	25%
Andrew Burnham	Stantec	15%
Cole Sullivan	Stantec	40%
Carol Malesky	Stantec	20%
Nick Juliano	Stantec	35%
Ryan Thiele	Stantec	35%

Engineering Enterprises, Inc. (184002003-0010) and Stantec (184004750-0006) are licensed to operate in the State of Illinois

Project Team

Major Active Projects Related to IIMP and PMP Key Staff

Client/Project	Michele Piotrowski	Jeffrey Freeman	Christopher Walton	Christopher Ott	Carlie Olsen	Jake Seger
Carpentersville Integrated Infrastructure Master Plan		o	o	o	o	o
Carpentersville Silverstone Lift Station and Force Main Modifications		o	o		o	
Elgin Annual Road Program				o		
Elgin Dundee Avenue Reconstruction						o
Elk Grove Village Water and Sewer Rate Study	o					
GPWC/Joliet Alternative Water Source Program		o				
Lockport Alternative Water Source Study	o	o				
Montgomery - Village Engineer				o		
Montgomery Water Model Analysis	o					
Montgomery Alternative Water Source Program			o	o		
Montgomery Annual Road Program						
Montgomery Aucutt Road Extension						o
Sugar Grove - Village Engineer	o					
Sugar Grove Annual Road Program				o		
Yorkville Alternative Water Source Program			o			
Yorkville Beecher Road Reconstruction						o
Yorkville Annual Road Program				o		o
Yorkville East Hydraulic Improvements				o		
Warrenville Well 13 Water Treatment Plant					o	
Warrenville - Various Projects	o					

The table above presents a listing of current major projects for proposed personnel. Completion dates and milestones for the projects vary across the remainder of the calendar year. Our team can deliver this Study and achieve major milestones beginning in August of 2026 through December of 2027. The EEI/Stantec team maintains a strong bench of additional resources to be engaged as needed to deliver the highest level of quality and rigor our clients expect with minimal impacts to cost or schedule.

Active Revenue Sufficiency Study Projects

National & Regional Clients	David Hyder	Cole Sullivan	Andrew Burnham	Carol Malesky	Nick Juluano	Ryan Thiele
Effingham IL	•	•				•
Centerville, MD	•					
Northeast Ohio Regional Sewer District, OH		•	•	•		
Bartlett, IL	•	•	•			
Joliet, IL		•		•		•
Fauquier County Water & Sanitation Authority, VA	•				•	
Parker Water & Sanitation District, CO		•		•		•

The table above presents a listing of current projects for proposed personnel. Completion dates and milestones for the projects vary across the remainder of the calendar year. **Our team can deliver this Study and achieve major milestones beginning in May of 2026 through October 2026 as listed in the RFQ**. Stantec maintains a strong bench of additional resources to be engaged as needed to deliver the highest level of quality and rigor our clients expect with minimal impacts to cost or schedule.

Project Experience

The following project experience demonstrates our Project Team's proven ability to deliver comparable scopes for government agencies throughout northeast Illinois, with direct relevance to Geneva's integrated infrastructure planning, capital programming, and long-term funding needs.

MASTER PLANS **Project / Client**	**Water**	**Sewer**	**Stormwater**	**Pavement**	**Rate / Funding**	**10-Year CIP**	**11–30 Year Planning**	**Integrated Delivery**	**Relevance to Geneva**
Integrated Infrastructure Master Plan Village of Carpentersville	●	●	●	●		●	●	●	Most closely matches Geneva's desired integrated planning framework across disciplines. Deliverables will include a summary report & an ArcGIS StoryMap of the IIMP.
Comprehensive Water and Sewer Master Plan City of Elgin	●	●	●	●	●	●	●	●	Reflects integration of the lead service line, aging utilities, & drainage priorities with pavement programming and neighborhood implementation. Utilizes a full cost of service rate analysis to identify equitable funding for improvements. Deliverables included a detailed summary report & an ArcGIS StoryMap of the IIMP.
Water Works System Master Plan City of Batavia	●				●	●	●	●	Demonstrates experience aligning rate strategy, reserve planning, & capital investment needs.
Comprehensive Water and Sewer Master Plan Update Village of Huntley	●	●				●	●	●	Shows the benefits of planning water & sewer improvements simultaneously to identify synergies between projects & programs in capital needs.

Legend: ● = Major project component; ✓ = Included/supporting component

Project Experience

Project Name	Brief Scope	Client/Reference
Integrated Infrastructure Master Plan	• Development of the Village's Integrated Infrastructure Master Plan (IIMP) to consolidate separate planning documents into one comprehensive planning resource • Review of existing water, sanitary sewer, storm sewer, and transportation planning documents • Identification and mapping of Immediate (1–5 years), Near Future (6–10 years), and Long Term (>10 years) capital improvement needs across infrastructure systems • Plan deliverables summarized through tables, geodatabase tools, StoryMaps, and an executive summary describing existing infrastructure, CIP development methods, and recommended projects • Framework designed to remain adaptable for future Village needs, priorities, and updates	Village of Carpentersville **Kevin Gray, PE** Director of Public Works and Engineering (224) 293-1613
Comprehensive Water and Sewer Master Plan ***(EEI/Stantec Team)***	• Development of comprehensive water and sewer master plans to support capital improvement planning and long-range utility decision-making • Assessment of water and wastewater infrastructure condition and capacity, including analysis of recent water use, wastewater flows, irrigation demand, and inflow and infiltration • Performance of water audits, loss analysis, and forecasting of future water demand and wastewater flows under multiple growth scenarios • Preparation of source water assessments, evaluation of future well and EWST locations, development of LSLR and water main replacement plans, evaluation of PFAS treatment alternatives, hydraulic modeling and impact evaluation of dam removal, and recommendations for infrastructure improvements needed to meet projected demands • Development of cost estimates, phasing and implementation plans, master plan reports, and rate study options to support funding of recommended improvements • Plan deliverables included a detailed summary report along with supporting reports (rate study, dam removal impact analysis) and StoryMaps	City of Elgin **Nora Bertram** Water Director (847) 931-6744

Project Experience

Water Works System Master Plan	• Review of water system reports, water quality data, and historical water use information to assess existing conditions and system needs • Evaluation of water conservation opportunities, population growth, and projected water demand to support long-range planning • Preparation of tables and exhibits summarizing major system components, existing conditions, and recommended improvements • Completion of sustainable source water analysis and evaluation of supply and treatment alternatives. • Development of cost estimates, phasing strategies, implementation plans, and master plan documentation for recommended improvements	City of Batavia **Jeremy Barkei** Assistant Director of Public Works (630) 454-2450
Comprehensive Water and Sewer Master Plan Update	• Development of comprehensive water and sewer master plans to support capital improvement planning and long-range utility decision-making • Assessment of water and wastewater infrastructure condition and capacity, including analysis of recent water use, wastewater flows, irrigation demand, and inflow and infiltration • Performance of water audits, loss analysis, and forecasting of future water demand and wastewater flows under multiple growth scenarios • Preparation of source water assessments, evaluation of future well locations, and recommendations for infrastructure improvements needed to meet projected demands • Development of cost estimates, phasing and implementation plans, master plan reports, and rate study options to support funding of recommended improvements	Village of Huntley **Timothy Farrell, PE** Director of Public Works and Engineering (847) 515-5285

Project Experience

RATE STUDIES **Project / Client**	**Water**	**Sewer**	**Stormwater**	**Pavement**	**Rate / Funding**	**10-Year CIP**	**11–30 Year Planning**	**Integrated Delivery**	**Relevance to Geneva**
Capital Improvement Planning and Rate Study Village of Montgomery	●	●	✓	●	●	●	●	●	Demonstrates coordination of utility replacement and roadway work through phased capital planning while balancing budget constraints and tolerance for rate increases.
Capital Improvement Planning and Rate Study United City of Yorkville	●	●	✓	●	●	●	●	●	Supports Geneva's need to connect utility planning, stormwater needs, transportation improvements, and financing strategies.
Water and Sewer Rate Study Village of Bartlett	●	●	✓		●	●	●	●	Highlights review of existing planning documents/efforts, utility life cycle analysis, and full cost of service rate analysis to equitably charge customers for the necessary capital improvement projects

Legend: ● = Major project component; ✓ = Included/supporting component

Project Experience

Capital Improvement Planning and Rate Study	• Development of capital improvement plans based on review of existing public works infrastructure and evaluation of asset condition, performance, and capacity • Identification of current and future infrastructure needs using population growth, demographics, asset conditions, regulatory requirements, and development plans • Prioritization of projects based on criticality, impact, and urgency to support phased implementation • Engagement with staff and elected officials to establish a long-term vision, define project objectives, and develop cost estimates, schedules, and phasing plans • Preparation of multi-year financial plans aligned with the CIP through analysis of available funding sources • Development of water and sewer rates to accommodate the water and sewer improvements and expenses	Village of Montgomery **Jeff Zoephel** *Village Administrator* (331) 212-9002
Capital Improvement Planning and Rate Study	• Development of capital improvement plans based on review of existing public works infrastructure and evaluation of asset condition, performance, and capacity • Identification of current and future infrastructure needs using population growth, demographics, asset conditions, regulatory requirements, and development plans • Prioritization of projects based on criticality, impact, and urgency to support phased implementation • Engagement with staff and elected officials to establish a long-term vision, define project objectives, and develop cost estimates, schedules, and phasing plans • Preparation of multi-year financial plans aligned with the CIP through analysis of available funding sources • Development of water rates to accommodate the water improvements and expenses	United City of Yorkville **Eric Dhuse** *Public Works Director* (630) 553-4370

Project Experience

Water and Sewer Rate Study ***(EEI/Stantec Team)***	• Conducted a comprehensive water and sewer rate study to evaluate long-term financial needs, cost of service across customer groups, and sustainable rate structures • Developed a preliminary financial forecast incorporating operating trends, projected debt, and anticipated capital improvements for both systems • Identified future revenue adjustments beginning in FY 2027 to maintain adequate reserves and meet financial targets through the planning horizon • Completed a cost-of-service analysis to confirm equitable allocation of costs among customer classes and counties served • Evaluated rate structure alternatives, including meter-based base charges, revised fixed and volumetric revenue balances, and updated usage rates to improve equity, affordability, and revenue stability	Village of Bartlett **Dan Dinges, PE** *Director of Public Works* (630) 837-0811

Stantec Project Experience

Stantec has completed more than 1,500 financial & rate studies for government/utility clients in the past 10 years, & we specifically have experience with Water, Sewer, Reuse, Stormwater, & Solid Waste Revenue Sufficiency Analysis, Cost Allocation, & Rate & Fee Design. We regularly provide comprehensive rate & financial management consulting services for our clients. Our project team has worked with over 50 communities within northern Illinois, providing financial & engineering services. Below is a list of Stantec's recent rate study projects in Illinois, with detailed references provided on the following pages.

Illinois Clients & Services	Revenue Requirements	Cost of Service Analysis	Rate Structure Development	Stormwater Utility Analysis	Capacity Charges / Impact Fees	Misc. Fees & Charges	Affordability Analysis / WARi	Capital Project Funding
City of Effingham	•	•	•		•	•		•
City of Elgin	•	•	•		•			•
City of Elmhurst	•	•	•	•				
City of Geneva	•	•	•	•	•	•		•
City of Joliet							•	•
City of Peoria			•					
Lake Sara Water Authority			•		•			•
Village of Bartlett	•	•	•		•	•		•
Village of Downers Grove	•	•	•	•	•	•		•
Village of Glenview	•	•	•			•		•
Village of Skokie	•	•	•					•
Village of South Elgin	•	•	•		•			•

Project Experience

PAVEMENT MANAGEMENT PLANS (PMPs) **Project / Client**	Water	Sewer	Stormwater	Pavement	Rate / Funding	10-Year CIP	11–30 Year Planning	Integrated Delivery	**Relevance to Geneva**
Pavement Management Program Village of Montgomery				●	●	●		●	Demonstrates ability to develop a Pavement Management Program for a similarly sized community to Geneva.
Pavement Management Program United City of Yorkville				●	●	●		●	Demonstrates ability to develop a Pavement Management Program for a similarly sized community to Geneva.
Pavement Management Program Village of Elk Grove Village				●	●	●		●	Demonstrates ability to develop a Pavement Management Program for a community with a TIF.
10-Year Pavement Preservation Plan City of Rockford				●		●			Demonstrates ability to develop a Pavement Preservation Plan for a large community with a diverse roadway network.

Legend: ● = Major project component; ✓ = Included/supporting component

Project Experience

Pavement Management Program	• Develop an inventory of all streets maintained by the Village • Perform Pavement Inspection to determine Pavement Condition Index 0-100 • Review Current and Future Funding Needs • Investigate additional funding sources to meet current and future infrastructure needs • Review and Determine Roadway Rehabilitation Strategies • Draft and finalize a 5-Year Street Rehabilitation Plan • Present Pavement Management Findings to Village Board	Village of Montgomery **Jeff Zoephel** *Village Administrator* (331) 212-9002
Pavement Management Program	• Develop an inventory of all streets maintained by the City • Perform Pavement Inspection to determine Pavement Condition Index 0-100 • Review Current and Future Funding Needs • Investigate additional funding sources to meet current and future infrastructure needs • Review and Determine Roadway Rehabilitation Strategies • Draft and finalize a 5-Year Street Rehabilitation Plan • Present Pavement Management Findings to City Council	United City of Yorkville **Eric Dhuse** *Public Works Director* (630) 553-4370
Pavement Management Program	• Develop an inventory of all streets maintained by the Village • Perform Pavement Inspection to determine Pavement Condition Index 0-100 • Review Current and Future Funding Needs • Investigate additional funding sources to meet current and future infrastructure needs • Review and Determine Roadway Rehabilitation Strategies • Draft and finalize a 5-Year Street Rehabilitation Plan for the two focus/funding areas (local & BLF) throughout the community • Present Pavement Management Findings to Village Board	Village of Elk Grove Village **Bryan Grippo** *Public Works Director* (847) 734-8800
10-Year Pavement Preservation Plan	• Development of a 10-Year city-wide pavement preservation plan for asphalt rejuvenation, microsurfacing, and Pressure Pave • Analysis of existing pavement management data to identify preservation needs, project locations, and planning-level costs • Evaluation of pavement scores across 737 miles of City-owned and maintained roadways to support network-wide recommendations	City of Rockford **Ken Mattson** CIP Operations Manager (779) 348-7486

Project Experience

	• Identification of candidate streets and selection of appropriate preservation techniques, including reclamite, microsurfacing, and Pressure Pave • Preparation of an experimental features memo to support IDOT approval of Pressure Pave for use with Motor Fuel Tax funding	

3

Project Approach

WATER & SEWER RATE STUDY, PAVEMENT MANAGEMENT PLAN, & INTEGRATED INFRASTRUCTURE MASTER PLAN



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Project Approach

Understanding of the Project

EEI understands that Geneva is not simply procuring a rate study, pavement plan, and infrastructure master plan—it is selecting a partner to help the City make smarter, better-coordinated capital decisions that will affect residents and businesses in decades to come. EEI understands the City is seeking an integrated framework that connects utility financial planning, transportation asset management, stormwater improvements, and water and sewer long-term capital planning into a unified decision-making process. Given the City's ownership of its electric utility, high-level coordination with the Electric Division may also be considered to identify potential infrastructure and construction synergies if City staff elects to do so.

Our approach is designed to help Geneva turn multiple planning efforts into one coordinated, implementation-ready strategy.

- **One integrated plan, not three separate studies:** A unified strategy that aligns the Rate Study, Pavement Management Plan, and Infrastructure Master Plan.
- **Practical municipal recommendations:** Pragmatic, implementable solutions backed by EEI's extensive infrastructure planning experience to align improvements across disciplines to reduce redundant construction, limit disruption, and maximize the value of each capital investment.
- **Coordinated infrastructure planning:** Aligns water, wastewater, roadway, and drainage improvements to maximize investment value and minimize disruption.
- **Grounded in Geneva's current planning context:** Leverages Geneva's current studies, programs, and capital planning assumptions.
- **Integrated financial and technical analysis:** Evaluate budgets, audits, ordinances, customer class data, debt obligations, reserve targets, and infrastructure needs as part of one integrated planning process.
- **Short-term action with long-term direction:** Deliver a sensible 1–10 year CIP and a defensible 11–30 year planning framework for both priority and deferred projects to assist Geneva in managing renewal, affordability, and future investment timing.

EEI combines municipal infrastructure planning, utility analysis, and implementation-focused decision support to help Geneva move from separate planning efforts and studies to one coordinated and actionable roadmap for the next 30 years.

How We Will Organize to Perform the Services

EEI, partnering with Stantec, will deliver the project through a multidisciplinary team that combines expertise in:

- Water and wastewater
- Stormwater planning
- Transportation and pavement management
- Asset management
- Capital improvement planning
- GIS and data visualization
- Utility finance and rate analysis



Project Approach

Chris Walton, a Project Manager with over 14 years of experience, will serve as Geneva's primary point of contact and will be responsible for project coordination, schedule management, quality assurance, and communication. EEI will focus on the development of the Integrated Infrastructure Master Plan (IIMP) and work closely with Stantec on the utility rate analysis. As discussed in the Project Approach below, facilitating workshops with City staff will be critical in bringing the various components together into one, Integrated Infrastructure Master Plan.

Project Approach

Our project delivery process integrates financial planning, infrastructure evaluation, and implementation strategies to ensure coordinated, practical recommendations. Following a kickoff meeting and data collection effort to confirm objectives, assumptions, and decision points, financial and technical analyses will proceed concurrently to align funding strategies, rate recommendations, and capital priorities. Regular working sessions and milestone reviews will engage City staff throughout the process, resulting in recommendations that are technically sound, financially sustainable, and aligned with Geneva's operational and policy goals. The project will be completed through three integrated planning efforts:

1. Pavement Management Plan

Our pavement management approach is intended to help Geneva transition from annual programming to a more data-driven, long-range asset management framework.

- **Evaluate current pavement conditions and program data:** We will review available pavement condition information, historical street program records, maintenance practices, and current decision-making methods to establish a baseline for pavement management practices in the City.
- **Perform system-side pavement condition inspection:** We will work with the City to evaluate proposals and select a pavement inspection sub-consultant. Once a consultant has been selected, a full system-wide pavement condition inspection will be completed to provide a ranking of 0-100 for all streets and alleys maintained by the City. The data will be required to be compatible with PAVER.
- **Develop and review various budget scenarios:** Multiple budget scenarios to determine future funding requirements will be analyzed and reviewed with City staff and City Council, including potential ways to help fund long term transportation improvements.
- **Develop a pavement management plan tied to the CIP:** The PMP will support a prioritized short-term (Years 1–10) capital improvement program and a long-term (Years 11–30) planning framework that reflects condition, lifecycle needs, and funding realities.
- **Coordinate pavement improvements with underground infrastructure:** We will evaluate opportunities to align pavement work with water, sanitary sewer, and storm sewer improvements to reduce redundant construction and improve overall program efficiency. Upon request, we can also coordinate with electric underground improvements.
- **Conduct a workshop with City staff:** It is important to meet and discuss the data and trends observed with City staff, but it is even more critical to understand City motivations and priorities once the data is summarized. A workshop with City staff will allow open discussion and allow the priorities of City staff to be embodied into the PMP.

- **Support Geneva's transition to a more data-driven asset management approach:** Our recommendations will help the City move beyond annual programming toward a more consistent, lifecycle-based framework for pavement investment and long-range capital planning.

2. Integrated Infrastructure Master Plan (IIMP)

The IIMP will serve as the City's primary capital planning document by bringing together recommendations from the previous rate study, pavement management planning, and existing water, wastewater, and drainage studies. To provide a holistic approach for planning beyond the 10-Year CIP for all water, wastewater, and stormwater infrastructure needs beyond the existing planning documents, the following will be completed:

- **Life cycle analysis of water and wastewater facilities:** Development of 30-year maintenance and rehabilitation schedules for each of the water and wastewater system facilities. As part of this process, timing, costs, and associated funding options for potential regulatory items identified will be provided.
- **Life cycle analysis of underground infrastructure:** Evaluation of water main and sewer main age and replacement rates along with any other institutional knowledge regarding particular areas of concern**.**
- **Stormwater management infrastructure review:** Inventorying of City-owned stormwater assets, review of past and planned improvements, along with operational recommendations from the Comprehensive Drainage Study, and evaluating current maintenance practices such that we can identify existing and future system needs.
- **Compliance with the NPDES MS4 Permit requirements:** Review of the City's National Pollution Discharge Elimination System (NPDES) MS4 permit and associated Facility Inspection Reports to better understand the City's current minimum obligations.
- **Identify defensible inflation rates to utilize:** Research and recommend inflation rates for construction cost estimates to be included in future CIP costs.
- **Conduct a regulatory review:** Identify potential regulations related to concerns, including, but not limited to, per- and polyfluoroalkyl substances (PFAS), phosphorus and nitrogen, lead service lines, Capacity, Management, Operations, and Maintenance (CMOM) requirements, and cybersecurity to determine how these regulations could impact the City in the foreseeable future.
- **Conduct workshops with City staff to identify near- and long-term priorities for the water, wastewater, and stormwater systems:** Using GIS-based mapping and infrastructure data, EEI will facilitate discussions regarding utility, drainage, and pavement needs to establish project priorities and evaluate opportunities for coordinated improvements. We will also work with staff to define desired levels of service for the various utilities and develop corresponding capital and operational cost projections.

Capital projects will be prioritized based on infrastructure condition, operational risk, regulatory requirements, funding availability, and coordination opportunities. Particular emphasis will be placed on aligning roadway, storm sewer, water main, sanitary sewer, and lead service line projects to reduce disruption, eliminate redundant construction activities, and improve overall program efficiency.

3. Water and Sewer Rate Study and Connection Fee Analysis

The Stantec team will perform a comprehensive financial and cost-of-service evaluation based on the improvements identified within the Integrated Infrastructure Master Plan, which includes:

- Revenue requirements and financial forecasting
- Fund balance and reserve policy evaluation
- Customer class cost allocation and rate design
- Water and sewer connection fee evaluation
- Debt financing and capital funding strategies
- Evaluation of funding strategies or funding stormwater improvements
- Utility benchmarking and affordability considerations

The analysis will recommend financially sustainable rates and connection fees that support operations, infrastructure investments, and regulatory compliance. It will achieve equitable cost recovery while carefully balancing and mitigating the financial impact on Geneva's residents.

Code Analysis and Jurisdictional Approvals

We will incorporate regulatory and jurisdictional considerations early so Geneva can move from planning to implementation with greater confidence.

- **Recommendations grounded in real requirements:** We will review applicable statutes, ordinances, bond covenants, fund reserve requirements, utility regulations, and permitting considerations that influence rates, utility planning, and capital implementation.
- **Compliance considered early:** Legal, financial, environmental, and operational requirements will be incorporated into project prioritization and sequencing rather than addressed later.
- **Implementation readiness:** Our planning recommendations will be structured to help the City move priority projects into design and delivery with fewer surprises.
- **Anticipation of jurisdictional coordination:** We will identify likely agency coordination and approval issues related to IEPA funding, NPDES MS4 obligations, railroad or utility coordination, easements, land rights, and other permitting factors that may affect timing or cost.
- **Fewer downstream surprises:** By identifying approval and coordination needs during planning, Geneva will be better positioned to sequence projects, pursue funding, and manage implementation risk.

Deliverables and Decision Support

Our deliverables will be structured to support staff review, policy discussion, and long-term use by the City.

- **Decision-ready deliverables:** We will provide draft and final reports, clear exhibits, graphics, tables, and executive summaries that support staff review and policy-level decision-making.
- **Tools the City can continue to use:** Consistent with EEI's implementation-oriented approach, deliverables will include a spreadsheet-based rate model and GIS/story map-based planning tools that staff can use to manage, update, and communicate the IIMP, PMP, and CIP after the study is complete.
- **Clear communication to multiple audiences:** Findings will be prepared for both technical staff and elected officials, including presentations to the Committee of the Whole and City Council.

EEI offers Geneva the advantage of a multidisciplinary municipal team that understands how infrastructure planning, financial strategy, regulatory obligations, and implementation decisions must work together—resulting in a plan the City can use, defend, and act on.

4

Resumes

WATER & SEWER RATE STUDY, PAVEMENT MANAGEMENT PLAN, & INTEGRATED INFRASTRUCTURE MASTER PLAN



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Experience:
28 years

Education:
MBA, 2020, Business Administration, University of Illinois Urbana-Champaign
BS, 1998, Civil Engineering, The Catholic University of America

Registration
- Professional Engineer - Illinois, 2005, 062-058393

Certifications:
- AWWA Utility Risk and Resilience Certificate Program, American Water Works Association
- Accreditation Leadership in Energy and Design (LEED AP), Green Building Certification Institute
- Certified Master Modeler - SewerCAD, Bentley
- Certified Master Modeler - WaterCAD, Bentley
- Certified Review Specialist, Kane County Stormwater Ordinance

Professional Associations/ Technical Committees:
- Chair and Water Loss Trainer, Illinois Section American Water Works Association
- Industry Recruitment, Integrated Water Management, and Professional Advancement Committees, Illinois Section American Water Works Association
- Member, Kane County Water Association
- Member, Society of Professional Coatings
- Member, American Water Works Association
- Vice Chair, Village of Sugar Grove Economic Development Corporation

Personal Awards:
- Crain's Chicago Business, 2023, Notable Women in Stem

MICHELE L. PIOTROWSKI, PE, LEED AP

PRINCIPAL-IN-CHARGE

Michele Piotrowski is a Vice President with over 28 years of engineering experience. She has managed the planning, design, maintenance, and construction of various municipal projects, including road programs, water main (new and replacement), water towers (new and rehabilitated), and pump stations. With her experience, Michele can effectively guide her team to the successful completion of project assignments.

REPRESENTATIVE EXPERIENCE

Water Works System Master Plans, Various Communities, Illinois

Provided project engineering, project management, and/or QA/QC for comprehensive analysis of Water Works Systems (WWS) including supply, treatment, storage, and distribution components for long-term WWS planning for the communities of Algonquin, Elgin, Hampshire, Montgomery, Sugar Grove, Warrenville, West Chicago, and Yorkville. Performed detailed calculations and analysis to determine existing and future needs, evaluated source water options, completed cost-effective analyses of treatment options, reviewed wastewater implications of potable water treatment processes, prepared cost estimates, and analyzed water rates for proposed improvements.

Capital Improvement Planning, Various Communities, Illinois

Provided project engineering, project management, and/or QA/QC for the development of various capital improvement plans. Work includes review of existing public works infrastructure and evaluation of current condition, performance, and capacity of assets. Current and future needs are identified based on population growth, demographics, infrastructure conditions, regulatory requirements, and development plans. Projects are prioritized based on criticality, impact, and urgency. Engaged with staff and Board/Councils, defined clear long-term vision for infrastructure needs of the community, defined scope and objective for each project, and developed cost estimates, schedules, and phasing plans for project implementation. Create a multi-year financial plan that aligns with overall CIP by analyzing available funding sources. Participated in capital improvement planning for the communities of Bartlett, Elburn, Montgomery, Schaumburg, Sugar Grove, and Yorkville.

Rate Studies, Water and/or Sewer, Various Communities, Illinois

Project Manager for the development of water and/or sewer utility rate studies. Work included historical review of the water budget and actual expenditures and revenues, review of existing and proposed operating and maintenance costs, development of facility maintenance schedules, projection of revenue requirements, estimation of anticipated capital development projects, review of the adequacy of existing rates and fees and comparison of adjacent community rates. Numerous exhibits were developed to present recommendations, and the final recommendations were presented at a Village Board or City Council meeting. Participated in rate studies for the communities of Bartlett, Elk Grove Village, Hinckley, Montgomery, Oswego, Pingree Grove, Schaumburg, and Yorkville.

Water Audits and Non-Revenue Reduction Programs, Various Communities, Illinois

Project Manager for preparation of the AWWA M36 based Water Audits and, as applicable, LMO-2 form to meet Lake Michigan Allocation permit requirements through the Illinois Department of Natural Resources (IDNR). In communities experiencing more than 10% of NRW, a Water System Improvement Plan was developed to attack real losses, apparent losses, and unbilled authorized uses. Regular meetings are facilitated to track progress and update the Water System Improvement Plan as necessary. Conducted water audits and/or developed Water System Improvement Plans for the communities of Channahon, Crest Hill, Elgin, Joliet, Minooka, Montgomery, North Aurora, Romeoville, and Yorkville.

MICHELE L. PIOTROWSKI, PE, LEED AP

PRINCIPAL-IN-CHARGE

Water Modeling and Hydraulic Analysis, Various Communities, Illinois

Provided project engineering, project management, and/or QA/QC for the development of computer model and/or ongoing hydraulic analysis to determine water system deficiencies, prioritize current and future demands and define capital improvement programs. Conducted water modeling for the communities of Algonquin, Batavia, Elgin, Elk Grove Village, Hampshire, Montgomery, Newark, North Aurora, Sugar Grove, Warrenville, West Chicago, Wheeling, and Yorkville.

Water Works System Project Plan, Various Communities, Illinois

Project Engineer responsible for the master planning report preparation to be used to obtain funding through the Illinois Environmental Protection Agency's Public Water Supply Loan Program for necessary water works system improvements. The reports included a review of the existing and projected population and water use, an evaluation of the existing water works system, recommended improvements, an evaluation of the existing Water Department's budget, and a recommended financing alternative involving a water rate adjustment. Four planning documents were prepared for the following communities: Carpentersville (1), Hinckley (1), Montgomery (2), Hampshire (1), and St. Charles (1).

Water Loss Audit Trainer, IEPA/ISAWWA Sponsored Water Loss Audit Training, Various Communities, Illinois

Lead various 1/2-day and 1-day, interactive Water Loss Audit training sessions which were administered through ISAWWA. The intent of the training was to provide a history of water loss auditing, demonstrate the benefits of doing an audit, and introduce potential users to the audit software. The Water Audit training was based on the AWWA M36 Water Audits and Loss Control manual and the associated free AWWA Water Audit Software. Each training session consists of a lecture and hands-on training using the AWWA Water Loss Audit software. The targeted audience are utility personnel and those representing utilities as the Responsible Operator in Charge or Village/City Engineer.

2015-2026 Road Program, Sugar Grove, Illinois

Provided oversight and management of Phase II and Phase III engineering services for the rehabilitation of multiple roadways within the Village. The projects included local and Motor Fuel Tax funds.

Technical Presentations/Publications

Water Works 360 (August 2025) - ***PREPARED FOR THE UNEXPECTED: HOW ELK GROVE VILLAGE NAVIGATED THE NSMJAWA SHUT-DOWN***

ISAWWA Water Loss Conference (October 2023, October 2024), Water Works 360 (August 2025) - ***STREAMLINE MONTGOMERY: NAVIGATING THE NON-REVENUE***

Northwest Planning Alliance (April 2026) ***WATER REDUCTION ROADMAP POWERING DATA, MANAGING WATER: A UTILITY'S BALANCING ACT IN PLANNING***

ISAWWA WATERCON (April 2026) ***THIRSTY GIANTS: PROACTIVELY PLANNING WATER SYSTEMS FOR DATA CENTERS AND MEGA-USERS***



Experience:
30 years

Education:
MS, 1996, Environmental Engineering, University of Illinois Urbana-Champaign
BS, 1994, Civil Engineering, University of Illinois Urbana-Champaign

Registration
- Illinois, 2000, 062-053688

Certifications:
- Certified Floodplain Manager (CFM), Illinois Association of Floodplain and Stormwater Management
- Leadership in Energy and Environmental Design Accredited Professional (LEED AP), Green Building Certification Institute

Professional Associations/ Technical Committees:
- Member, American Society of Civil Engineers
- Board, Past Chair, Illinois Section, American Water Works Association
- Member, Kane County Water Association
- Member, American Society of Civil Engineers
- Member, American Water Works Association
- Hall of Fame Committee, Veterans Initiative, Water Utility Council, Illinois Section, American Water Works Association

Personal Awards:
- ISAWWA, 2020, Water Professional of the Year
- ISAWWA, 2014, Robert T. Sasman Volunteer of the Year Award
- ISAWWA Annual Conference, 2006, Presentation of the Year
- ISAWWA Annual Conference, 2004, Presentation of the Year

JEFFREY W. FREEMAN, PE, CFM, LEED AP

TECHNICAL ADVISOR

Jeff Freeman is the Chief Executive Officer / Principal with 30 years of engineering experience with expertise in water, wastewater, stormwater, and floodplain management. Jeff has led the planning, design, and construction of hundreds of successful projects and takes great pride in being able to make a difference for communities and their infrastructure.

REPRESENTATIVE EXPERIENCE

Comprehensive Water and Sewer Master Plan, Elgin, Illinois

Provided project management and principal level leadership for the development of Water and Sewer Master Plans, as well as an overall Integrated Infrastructure Master Plan (IIMP) for the City of Elgin. As the lead consultant, completed population and water demand projections and updated the City's water plan (update from EEI plan developed in 2011) to provide water service throughout the City's existing and planned service area. Following the completion of the Sewer Master Plan by a subconsultant, EEI facilitated the water and sewer rate study. In addition to developing detailed reports, the project team summarized the IIMP (water, sewer, and transportation), in the form of ESRI StoryMaps that are accessible online and easily editable.

Integrated Infrastructure Master Plan, Carpentersville, Illinois

Providing principal level leadership for the development of an Integrated Infrastructure Master Plan (IIMP) for the Village's water, wastewater, stormwater, and transportation infrastructure. Since the Village had already conducted several planning efforts, the goal of the project is to combine all of the planning efforts into an integrated plan. Workshops were conducted to identify the capital projects and build out a 10-year capital improvement plan for water, wastewater, and stormwater. Recently obtained pavement condition index (PCI) values were analyzed, and a 10-year pavement management plan was developed. All components will be combined in the form of ESRI StoryMaps that are accessible online and easily editable.

Water Works System Needs Assessment, Project Plans, Master Plans, and Rate Studies, Various Communities, Illinois

Provided project engineering, project management, or QA/QC for Water Works System planning documents for the communities of Algonquin, Batavia, Burlington, Elgin, Hampshire, Huntley, Joliet, Lake Zurich, Libertyville, Montgomery, Maple Park, Newark, Oswego, Sugar Grove, Union, and Yorkville. Performed detailed analysis to determine existing and future needs, evaluated source water options, completed cost-effective analyses of treatment options, provided technical review of Water Works System models, reviewed wastewater implications of potable water treatment processes, calculated water works system connection fees and water rate modifications, prepared extensive summary reports and conducted presentations.

Water and Sewer Rate and Connection Fee Analyses, Various Communities, Illinois

Project Management of Principal level leadership for planning level water and/or sewer rate and connection fee analyses for the communities of Bartlett, Elgin, Elk Grove Village, Lake Zurich, Montgomery, Schaumburg, Sugar Grove, and Yorkville.

Water Distribution System Analysis, Various Communities, Illinois

Project Manager for planning documents that included detailed water distribution system models for the communities of Algonquin, Elgin, Elk Grove Village, Montgomery, Sugar Grove, Warrenville, and Yorkville. Projects included model development, existing system evaluation, proposed condition model evaluations and cost estimates for the optimized solutions.



Experience:
14 years

Education:
BS, 2011, Civil and Environmental Engineering, University of Illinois Urbana-Champaign, Champaign, Illinois

Registration
- Professional Engineer - Illinois, 2017, 062-069864

Professional Associations/ Technical Committees:
- Member, American Water Works Association
- Integrated Water Management Committee, Chair, Illinois Section, American Water Works Association
- Source Water Committee, Past Chair, Illinois Section, American Water Works Association
- Youth Outreach Committee, Member, Illinois Section, American Water Works Association
- Annual Conference Technical Program Committee, Illinois Section, American Water Works Association
- Member, Kane County Water Association

CHRISTOPHER R. WALTON, PE
PROJECT MANAGER

Chris Walton is a Project Manager with 14 years of engineering experience. He has managed the planning, design, and construction engineering for municipal infrastructure projects. His knowledge and experience in municipal infrastructure, water resources, and environmental engineering provide a strong base for project management at all levels. Chris applies his strong project management, leadership skills, and detail oriented analysis to all projects.

REPRESENTATIVE EXPERIENCE

Integrated Infrastructure Master Plan, Carpentersville, Illinois

Project Manager for the development of the Village's Integrated Infrastructure Master Plan (IIMP) to combine existing separate planning documents into a singular comprehensive plan, scheduled to be completed by the end of 2026. The analysis includes review of existing Water Works System, Sanitary and Storm Sewer System, and Transportation planning documents, identification and mapping of Immediate (1-5 years), Near Future (6-10 years), and Long Term (>10 years) capital improvement needs across these different planning silos, and combining them into a single planning resource for the Village. The plan will be summarized using various tools including tabular, geodatabase, and StoryMaps together with an executive summary. The executive summary shall summarize the Village's existing infrastructure (water, wastewater, and transportation), and shall include a discussion of the methods used to develop the infrastructure CIP and a description of the projects included in the CIP. The plan will be adaptable and able to be updated to meet the future changing needs and priorities of the Village that may arise.

Capital Improvement Planning, Various Communities, Illinois

Provided project engineering, project management, and/or QA/QC for the development of various capital improvement plans. Work includes review of existing public works infrastructure and evaluation of current condition, performance, and capacity of assets. Current and future needs are identified based on population growth, demographics, infrastructure conditions, regulatory requirements, and development plans. Projects are prioritized based on criticality, impact, and urgency. Engaged with staff and Board/Councils, defined clear long-term vision for infrastructure needs of the community, defined scope and objective for each project, and developed cost estimates, schedules, and phasing plans for project implementation. Create a multi-year financial plan that aligns with overall CIP by analyzing available funding sources. Participated in capital improvement planning for the communities of Elburn, Montgomery, and Yorkville.

Water Works System Master Plans, Various Communities, Illinois

Completed comprehensive analysis of Water Works Systems (WWS) including supply, treatment, storage, and distribution components for long-term WWS planning for the communities of Batavia, Hampshire, Montgomery, North Aurora, and Yorkville. Reviewed water system reports and water quality data, analyzed historical water use data and performed needs assessment, evaluated water conservation, analyzed population and water use projections, prepared tables and exhibits summarizing major system components and conditions and recommended improvements and modifications, completed sustainable source water analysis, prepared cost estimates and phasing and implementation plans for supply and treatment alternatives, and prepared/compiled master plan reports. Montgomery and Yorkville WWS Master Plans included evaluation of Sub-Regional approach to meeting future supply and treatment needs, in collaboration together and with the Village of Oswego. Montgomery and Yorkville Master Planning includes ongoing planning, design, and coordination together with Oswego for their selected sub-regional alternative water source of Lake Michigan from DuPage Water Commission (DWC). Planning includes coordination with DWC on shared transmission main design and coordination with communities on intergovernmental agreements for cost sharing of

design and construction. Design engineering includes design of new Receiving Station supply points in compliance with DWC requirements, and design of additional internal system improvements, construction of which will begin in Summer 2025.

▶ *Water Works System Modeling and Analysis, Various Communities, Illinois*

Completed and oversaw various water modeling and analysis projects utilizing WaterGEMS modeling software, including comprehensive master planning model updates and analysis as well as targeted analysis of specific areas and proposed improvements for the communities of Algonquin, Batavia, Elk Grove Village, Hampshire, Huntley, Montgomery, North Aurora, Sugar Grove, Warrenville, and Yorkville. Reviewed existing GIS files, historic water use, and Water Works System (WWS) data and updated critical components of WWS model using WaterCAD, input current information including updated water main distribution network and components for analysis of proposed water distribution system improvements, assisted in coordination of fire flow testing and verification of WWS models, and analyzed models for alternative water main modifications using different demand scenarios. Prepared technical summaries of analysis, recommendations, and exhibits for municipalities.

▶ *Water Infrastructure and Rate Study, Wheeling, Illinois*

Project Manager for the development of the updated water model utilized for future developments and rehabilitation projects. Evaluated strengths of existing distribution system and identified system deficiencies, identified and modeled proposed improvements, confirmed distribution system water main sizing and developed the water works system improvement plan, and prepared conceptual cost estimates and an implementation plan for water distribution system improvements.

▶ *Water Works System Monthly Planning Meetings, Montgomery, Illinois*

Attend monthly meetings with Village Staff to review water works system operations, capital improvement planning and funding, and ongoing general water planning and consulting items. Meetings include review of all active and upcoming projects including well rehabilitation, water treatment plant planning and improvements, water distribution upgrades including water main replacement program, and regulatory compliance items and planning. Provided project engineering and management of analysis items including data collection and updating of dashboards for tracking well performance and distribution system water quality each month, and provided regular updates to Village Staff on ongoing projects and evaluation items.

▶ *USEPA Water Infrastructure Finance and Innovation (WIFIA) and IEPA State Revolving Fund (SRF) Loan Applications, Various Communities, Illinois*

Project Manager responsible for overseeing planning and completion of USEPA WIFIA and IEPA SRF loan applications for the communities of Montgomery and Yorkville, and assisted in the planning and completion of IEPA applications for the communities of Elburn and Hinckley. The loan application involves organizing municipal financial information and project information, and coordinating environmental submittal for regulatory review to submit to USEPA and IEPA. Extensive coordination with municipal staff and USEPA/IEPA staff is necessary to ensure the loan application is complete.

▶ *Flow Monitoring and Sanitary Sewer Evaluation Survey (SSES), Various Communities, Illinois*

Oversaw various projects to locate and characterize sources of inflow and infiltration (I/I) in the sanitary sewer system to reduce peak wet weather flows and overloading of the sanitary collection system for the communities of Bartlett, Elburn, Elk Grove Village, Montgomery, Sandwich, St. Charles, and Warrenville. Phase 1 flow monitoring consisted of coordination with subconsultant and the municipality to investigate the sanitary sewer system and install monitors at strategic locations to record and analyze sanitary flows and quantify I/I in the basin. Phase 2 SSES work consisted of manhole inspections, smoke testing, and televising to locate specific sources of I/I, and included coordination with subconsultant and municipality, and advanced communication emergency personnel, and residents and businesses, in addition to analysis of data to identify defects, classify and prioritize the defects by type and severity, and develop rehabilitation recommendations and cost estimates.

▶ *Alternative Water Source Planning, Montgomery and Yorkville, Illinois*

Project Manager responsible for overseeing planning for water source switchover from groundwater to Lake Michigan. Various projects included analysis and comparison of alternative water sources, development of preliminary cost estimates and cost analysis, WIFIA and IEPA Low Interest Loan application for funding for necessary improvements including preliminary engineering and project plan development for Lake Michigan improvements, and coordination with USEPA and IEPA, DuPage Water Commission, and municipal manager and staff. Improvements include new Lake Michigan Receiving Stations, Pressure Adjusting Stations, additional storage, and various distribution system upgrades, including water main replacement and associated improvements to reduce non-revenue water loss. Design for the various improvements is currently underway.



Experience:
1 year

Education:
BS, 2025, Civil Engineering, University of Illinois, Champaign, Illinois

Registration
- Engineering Intern - Illinois, 2025, 061.043387

Professional Associations/ Technical Committees:
- Member, Illinois Section, American Water Works Association

CARLIE E. OLSEN, EI
PROJECT ENGINEER

Carlie Olsen is a Project Engineer with one year of engineering experience. She has experience in environmental engineering, water and wastewater treatment, water resources engineering, and construction services. Carlie is continuously looking for opportunities to grow and advance her engineering knowledge by taking on new challenges.

REPRESENTATIVE EXPERIENCE

Integrated Infrastructure Master Plan, Carpentersville, Illinois

Project Engineer working on the Water, Sanitary, and Storm Systems. Conducted review of all previous planning documents previously completed by the Village. In-person visits to relevant water and wastewater facilities to inspect condition and take photos. Compiled asset inventory of the Village's Water and Wastewater systems. Developed 10-year CIP for water, wastewater, and Storm systems, including annual water main replacement programs and annual sanitary sewer lining programs as well as capital improvements. Coordinated GIS exhibits and utility map updates.

Wastewater System Master Plan, Genoa, Illinois

Provided wastewater system planning services to the City of Genoa. Analyzed historical wastewater flows and operation of the WWTP. Projected future population and wastewater flows, as well as planning for regulatory changes on the horizon. Conducted condition and capacity analysis of the unit processes at the WWTP to determine where the bottlenecks and future capacity constraints are. Evaluated WWTP expansion options and sized future unit processes to plan for future WWTP footprint. Estimated the cost of WWTP upgrades and assisted in the rate study to fund the improvements. Developed report and presentation deliverables to the City. City has moved forward with an SRF project plan for phase 1 of the design.

Water Works System Project Plan, Various Communities, Illinois

Project Engineer responsible for the master planning report preparation to be used to obtain funding through the Illinois Environmental Protection Agency's Public Water Supply Loan Program for necessary water works system improvements. The reports included a review of the existing and projected population and water use, an evaluation of the existing water works system, recommended improvements, an evaluation of the existing Water Department's budget, and a recommended financing alternative involving a water rate adjustment. Planning documents were prepared for the following communities: Carpentersville, Genoa, North Aurora, Sandwich, and Yorkville.

Well 13 Water Treatment Plant, Warrenville, Illinois

Provide Phase 3 construction observation and construction administration services for a new water treatment plant to treat 700 gpm of raw well water for iron removal in the City of Warrenville. Construction observation includes documentation and field direction for all excavation, underground utilities, structural work, and other key activities. Continually monitor and document construction progress throughout the duration of the project. Communicate daily with the contractor for planned work and coordination. Review submittals and respond to RFIs, addressing any construction conflicts that arise.



Experience:
13 years

Education:
BS, 2013, Civil Engineering, Summa Cum Laude, Bradley University, Peoria, Illinois

Registration
- Professional Engineer - Illinois, 2017, 062-069699

Certifications:
- Certified Public Infrastructure Inspector (CPII), American Public Works Association
- 10 Hour, OSHA
- ACI Concrete Field Technician - Level I, ACI
- Aggregate Certificate, IDOT
- Documentation of Contract Quantities, IDOT
- HMA - Level I, II, IDOT
- Maintaining Asphalt Pavements, University of Wisconsin-Madison
- Nuclear Density Tester Course, IDOT
- PCC - Level I, IDOT
- STTP-S15 Earth Excavation and Embankment, IDOT
- STTP-S33 Field Testing and Inspection Course, IDOT
- TT Understanding Specifications, IDOT Technology Transfer

Professional Associations/ Technical Committees:
- Education Committee, American Public Works Association - Fox Valley Branch
- Construction Committee, American Council of Engineering Companies - IL

CHRISTOPHER J. OTT, PE, CPII

PROJECT MANAGER

Chris Ott is a Project Manager with 13 years of experience as a design and resident engineer. His construction project experience includes mill and resurfacing, widening, full reconstruction, and underground utility projects. In addition, Chris has design experience that includes intersection design studies, traffic study reports, Phase I and Phase II design, and utilizing federal and local funding.

REPRESENTATIVE EXPERIENCE

Integrated Infrastructure Master Plan, Carpentersville, Illinois

Project Manager for the transportation component of the Village's Integrated Infrastructure Master Plan (IIMP), developing a comprehensive, data-driven, roadway strategy by evaluating historical and current roadway conditions, Pavement Condition Index (PCI) trends, and spending history. This effort integrates existing system performance with future roadway goals, planned capital improvement projects, and future budgets to establish prioritized investment strategies aligned with Village objectives. The resulting transportation plan is coordinated with other infrastructure systems to support a unified, financially sustainable IIMP, and is structured to remain adaptable to evolving conditions, budgets, and community needs over time.

Pavement Management Studies and System Development, Various Communities, Illinois

Project Manager or Project Engineer involved with various Pavement Management programs. Each project involved either manual inspection performed by EEI or automated inspection done by IMS or by ARA. Once pavement inspection was complete, a detailed review was completed with the Local Agency to determine the initial results of inspection. Coordination was completed to review budgets, complete cost estimates, review rehabilitation strategies to be used and analyze past performance of 5-Year rehabilitation plan. Final steps were to finalize and complete a 5-Year Rehabilitation plan through the use of Paver or PavePro software, write and present a final Pavement Management Report to the Village Board and Trustees to summarize the findings of the Pavement Management Program and lastly monitor and update the program to include all maintenance and rehabilitation completed since the inspection. Below are the different project and experiences: City of DeKalb (IMS): 2019; City of Sandwich (IMS): 2023; United City of Yorkville (IMS): 2014-2026; Village of Elk Grove Village (IMS): 2020, 2024; Village of Montgomery (IMS): 2015-2026; Village of Elburn (ARA): 2021; Village of Sugar Grove (ARA) 2021; Blackberry Township (MicroPaver): 2015; Village of Pingree Grove (Micropaver): 2014

10-Year Pavement Preservation Plan, Rockford, Illinois

Provide a 10-Year City-Wide Pavement Preservation Plan for asphalt rejuvenation and Microsurfacing/PressurePave for approval by IDOT. Scope of work include analyzing existing pavement management data and determining costs and locations for 10-year pavement preservation plan. The plan included analyzing the pavement scores of all 737 miles of roadway that are owned and maintained by the City of Rockford. Determining a 10-Year Pavement Preservation Plan including identifying which streets would be included in the plan and which preservation technique would be used (i.e. reclamate, microsurfacing or Pressure Pave). Work also included putting together an experimental features memo for IDOT approval for the use of PressurePave with MFT funds.

Capital Improvement Planning, Montgomery, Illinois

Provided project engineering, project management, and/or QA/QC for the development of capital improvement plans for the Village. Work includes review of existing public works infrastructure and evaluation of current condition, performance, and capacity of assets.

CHRISTOPHER J. OTT, PE, CPII
PROJECT MANAGER

Current and future needs are identified based on population growth, demographics, infrastructure conditions, regulatory requirements, and development plans. Projects are prioritized based on criticality, impact, and urgency. Engaged with staff and Board/Councils, defined clear long-term vision for infrastructure needs of the community, defined scope and objective for each project, and developed cost estimates, schedules, and phasing plans for project implementation. Create a multi-year financial plan that aligns with overall CIP by analyzing available funding sources.

2016-2026 Infrastructure Road Programs, Montgomery, Illinois

Provided design engineering and project management for the resurfacing of Village roadways. Projects consisted of earth excavation, pavement removal via cold milling, subbase repairs, pavement patching, new hot-mix asphalt binder and surface courses, curb and gutter removal and replacement, sidewalk removal and replacement; sidewalk ramps were replaced to comply with ADA standards, structure adjustments, installation of new 12-18" RCP storm sewer, pavement markings, traffic control and drainage improvements as necessary. Also included in the projects was the completed reconstruction of all the alleys located in the downtown sector of the Village and replacement with Porous Hot-Mix Asphalt and the installation if underdrains as a way to alleviate the drainage issues in the area. Additionally, extensive coordination and permitting with IDOT and Kane County Division of Transportation was required for the completion of the projects due to work within the County or State right-of-way and the use of Motor Fuel Tax Funds.

Annual Motor Fuel Tax (MFT) Street Rehabilitation Programs, Various Communities, Illinois

Provided design and construction services for the utilization of Motor Fuel Tax funds for the rehabilitation of various municipal roadways throughout DeKalb, DuPage, Kane and Kendall Counties. Design engineering services consisted of the field investigations and the preparation of plans and specifications required for bidding and IDOT approval. Projects typically consisted of pavement milling, pavement patching, new hot-mix asphalt binder and surface courses, replacement of deteriorated curb and gutter and sidewalk, and drainage improvements as necessary. Additionally, provided Phase III engineering services consisting of project management and onsite observation for most of the projects. The local agencies and years are as follows:

- City of Elgin 2021-2026
- City of Sandwich 2023-2024
- Village of Burlington 2020, 2022
- Village of Elburn 2015-2026
- Village of Hinckley 2013-2014, 2016, 2018, 2023, 2025
- Village of Newark 2015, 2017, 2019, 2021, 2023, 2025
- Village of North Aurora 2020-2022
- Village of Lily Lake 2015-2016, 2019, 2021, 2023
- Village of Lisle 2013, 2015-2016, 2018, 2020-2026
- Village of Sugar Grove 2013-2026
- United City of Yorkville 2013-2026

Surface Transportation Program (STP) - Resurfacing, Various Communities, Illinois

Provided Phase II and III engineering services for various STP federally funded projects within various local agencies. Preparation of the existing pavement prior to the HMA overlay utilized various options and combinations of pavement patching, milling, hot in-place recycling, and strip or area reflective crack control treatments. Other aspects of the projects included the removal and replacement of deteriorated curb and gutter, driveways and sidewalk; sidewalk ramps were replaced to comply with ADA standards, grading and shaping ditches, traffic signal detector loop replacement, aggregate shoulders, pavement marking, and restoration.

Village Engineer, Montgomery, Illinois

Village Engineer to the Village of Montgomery. Provide consultation to the Board and staff in the development of policies for infrastructure funding and implementation.



Experience:
13 years

Education:
BS, 2018, Civil Engineering, Bradley University, Peoria, Illinois

Registration
- Professional Engineer - Illinois, 2022, 062074305

Certifications:
- CPII, American Public Works Association
- 30-Hour, OSHA
- Aggregate Technician, IDOT
- Certified Floodplain Manager (CFM), ASFPM
- Documentation of Contract Quantities, IDOT
- HMA - Level I, II, and III, IDOT
- Nuclear Density Tester Course, IDOT
- PCC - Level I, II, and III, IDOT
- STTP-S33 Field Testing and Inspection Course, IDOT

JACOB H. SEGER, PE, CFM, CPII

PROJECT ENGINEER

Jake Seger is an experienced Senior Project Engineer II with 13 years of professional experience in the design and construction of underground utilities, road construction, traffic signals, and earthwork. Additionally, he has extensive experience in the execution of projects utilizing federal funding. Jake's communication skills have enabled him to build strong working relationships with his team and clients while executing projects successfully through their completion.

REPRESENTATIVE EXPERIENCE

Integrated Infrastructure Master Plan, Carpentersville, Illinois

Serves as Project Engineer for the transportation component of the Village's Integrated Infrastructure Master Plan (IIMP), developing a comprehensive, data-driven, roadway strategy by evaluating historical and current roadway conditions, Pavement Condition Index (PCI) trends, and spending history. This effort integrates existing system performance with future roadway goals, planned capital improvement projects, and future budgets to establish prioritized investment strategies aligned with Village objectives. The resulting transportation plan is coordinated with other infrastructure systems to support a unified, financially sustainable IIMP, and is structured to remain adaptable to evolving conditions, budgets, and community needs over time.

Pavement Management Programs and Resources

EEI's Pavement Management Program (PMP) Champion for research and creation of infographics, PMP Resources page content on company website, and staying up to date on the latest resources for municipalities. EEI offers guidance and presentation on the many facets of a PMP.

Local Road and Street Programs, Various Communities, Illinois

Provided design engineering services for the resurfacing of various roadways throughout DeKalb, DuPage, Kane, and Kendall Counties. Projects consist of pavement resurfacing, pavement patching, curb and gutter removal and replacement, new curb and gutter installation, storm sewer improvements, sidewalk repairs including ADA-compliant ramps and crosswalks, roadway widening, and roadway signage.

- Village of Montgomery 2019-2025
- Village of Sugar Grove 2022-2025
- United City of Yorkville 2019, 2023-2025
- Village of Lisle 2019, 2023-2025
- City of Elgin 2018-2026
- Village of Elburn 2018-2026
- City of Sandwich 2023-2024
- Village of Lily Lake 2021, 2023
- Village of Newark 2019, 2023
- Village of North Aurora 2019
- Village of Schaumburg 2018

Dundee Avenue Reconstruction (STP), Elgin, Illinois

Provided resident engineering services for the federally funded (STP-L) project which includes the reconstruction and widening of 0.53 miles of Dundee Avenue from Enterprise Street to Page Avenue. The improvements consist of new pavement, wider travel lanes, school bus lane extension, concrete curb and gutter, PCC sidewalk, ADA improvements, storm sewer, water main, sanitary sewer lining, street lighting, Rectangular Rapid-Flashing Beacons, traffic signal modifications, and landscape restoration.

N. State Street Resurfacing, Hampshire, Illinois

Provided Phase I and II services for the resurfacing of N. State Street in Hampshire. The project consisted of pavement milling, pavement patching, and hot-mix asphalt binder and surface courses. The project also included curb and gutter removal and replacement, structure adjustments, pavement markings, and restoration.



Experience:
34 years

Education:
AS, Computer Aided Design, Waubonsee Community College

Registration
- Professional Land Surveyor - Illinois, 2004, 035-03581

Professional Associations/ Technical Committees:
- Member, Illinois Professional Land Surveyors
- Member, National Society of Professional Surveyors

MARK G. SCHELLER, PLS

SURVEY MANAGER

Mark Scheller is a Senior Project Manager with 34 years of experience managing and working on land surveying projects, which include route surveys, legal document creation and research, computer-aided drafting in both Civil3D and MicroStation, calculations, field operations, cross sections, existing and proposed centerline alignments. His expertise areas include project management, ALTA/ACSM Land Title Surveys, plats for dedications, plats for annexations, plats for easements, subdivision plats, preparation of legal descriptions, field data acquisition and processing, topographic surveys, and title searches, along with QC/QA for the production of Plats of Highways, boundary surveys, and topographic surveys. He is also a Veteran of the U.S. Army.

REPRESENTATIVE EXPERIENCE

Bernadette Lane and Route 31 Water Main Replacement, Batavia, Illinois

Survey Project Manager responsible for the scheduling and managing of the field and office land surveying activity, QA/QC for the replacement of 3,210 feet of water main within a residential area. The project required researching the county records for land ownership, legal descriptions, existing right of way dedications, and the re-establishment of rights-of-way.

Dundee Avenue Reconstruction (STP), Elgin, Illinois

Survey Project Manager for the topographic survey of 2,774 feet of residential roadway. The project required scheduling and managing of the field and office land surveying activity, QA/QC, field data acquisition, processing of the topographic survey, searching the county records for existing right of way dedications and the reestablishment of rights of way, Plat of Highways, Grants of Easement and composition of legal descriptions.

Chicago Street Rehabilitation (STP), Elgin, Illinois

Survey Project Manager for the topographic survey of 3,500 feet of residential roadway. The project required scheduling and managing of the field and office land surveying activity, QA/QC, field data acquisition, processing of the topographic survey, searching the county records for existing right of way dedications and the reestablishment of rights of way, Plat of Highways, Grants of Easement and composition of legal descriptions.

2025 Water Main Replacement, Montgomery, Illinois

Survey Project Manager responsible for the scheduling and managing of the field and office land surveying activity, QA/QC for the replacement of 36,500 feet of water main within a residential area. The project required researching the county records for land ownership, legal descriptions, existing right of way dedications, and the re-establishment of rights-of-ways and easements.

Eldamain and Corneils Water Main Improvements, Yorkville, Illinois

Survey Project Manager responsible for the scheduling and managing of the field and office land surveying activity, QA/QC for the design of 27,000 feet of water main for service to future development. The project required researching the county records for land ownership, legal descriptions, existing right of way dedications, and the re-establishment of rights-or-way, processing the topographic survey from both conventional methods and LiDAR.

Alternative Water Source Program, Joliet, Illinois

Survey Project Manager responsible for the fee estimate, scheduling, and managing of field and office land surveying activities, oversight and assisting with QA/QC responsibilities for 60 plus miles of Lake Michigan water transmission main routes from Chicago to Joliet. The project consists of researching county records, reestablishing right-of-ways, section lines and property lines, bathymetric surveys of major river and canal crossings, topographic surveying, LiDAR targeting and surveying, composition of approximately 500 legal descriptions and plats and easement and plats of survey.



Experience:
11 years

Education:
BS, 2016, Urban Planning / GIS Certificate, Northern Illinois University, DeKalb, Il

Certifications:
- ArcGIS Online Application Suite
- ArcPro Software 3.0
- AutoCAD Civil 3D
- AutoCAD Impressions Rendering

MATTHEW J. TAYLOR

GIS ANALYST

Matt Taylor is a highly experienced Senior GIS Analyst with 11 years of experience involving a diverse range of engineering drafting and design for transportation and utilities, as well as, residential, commercial, and municipal projects. Matt specializes in the use of ArcGIS Pro, ArcGIS Online, or ArcGIS Desktop in data visualization, Diamond Maps application, AutoCAD to aid in complex engineering projects in a timely and cost-effective manner.

REPRESENTATIVE EXPERIENCE

Water Works System Needs Assessment, Project Plans, Master Plans, and Rate Studies, Various Communities, Illinois

Developed enterprise GIS databases to support water system needs assessments, master plans, capital improvement planning, and rate studies. Integrated water wells, treatment facilities, storage infrastructure, distribution systems, and associated asset information from historical records, development plans, and field data into a centralized geospatial platform. Leveraged ArcGIS Online web maps and applications to provide engineers, municipal staff, and stakeholders with improved access to infrastructure information, planning exhibits, and project data.

Comprehensive Utility Master Plan Update, Various Communities, Illinois

Developed and maintained the Various Communities utility GIS database to support comprehensive utility master planning and infrastructure evaluations. Consolidated mapping records, development plans, and asset information into a centralized geospatial system used for planning, analysis, and capital improvement programming. Created ArcGIS Online mapping applications and planning exhibits to improve collaboration and access to utility system information.

Infiltration and Inflow (I/I) and Flow Monitoring Reports, Various Communities, Illinois

Developed GIS mapping and planning exhibits to support infiltration and inflow investigations, flow monitoring studies, and sanitary sewer system evaluations. Integrated flow modeling results, smoke testing observations, transmission main information, and sewer basin data into geospatial analysis tools used to identify system deficiencies and prioritize improvements.

Atlas Map Updates and Utility Asset Database Development, Various Communities, Illinois

Modernized utility mapping and asset inventories through GIS database development, atlas map updates, GPS field verification, and aerial imagery analysis. Improved the accuracy of utility asset locations and attribute information while establishing data standards and asset management frameworks to support infrastructure planning and maintenance activities. Leveraged ArcGIS Online applications to provide municipal staff with enhanced access to utility asset information and interactive mapping resources.

Infrastructure Master Planning and Utilizing ArcGIS StoryMaps to Support Capital Improvement Program (CIP), Elgin, Illinois

Developed interactive ArcGIS StoryMaps to communicate Capital Improvement Program (CIP) projects and infrastructure master planning initiatives. Integrated GIS data, consultant planning recommendations, and project information into a centralized platform to visualize existing infrastructure, planned improvements, project priorities, and funding needs. Leveraged ArcGIS Online applications and interactive mapping tools to provide City staff, elected officials, stakeholders, and the public with improved access to planning information and project updates. Utilized StoryMaps to enhance stakeholder engagement, support decision-making, and increase transparency for long-term infrastructure planning and capital investment strategies.

Resumes



Dave Hyder

Washington, D.C.

Project Role: Project Director

26 years experience

Education:

Masters of Business Administration in Finance, Johns Hopkins University, Baltimore, Maryland, 2002

Bachelor of Science, Civil / Environmental Engineering, Michigan State University, East Lansing, Michigan, 1998

Memberships:

Rates and Charges Committee, American Water Works Association

David is a Senior Principal with Stantec, applying engineering, environmental and financial expertise to a broad range of projects for clients. David has 26 years of professional experience, and he specializes in assisting public sector clients with the financial and managerial aspects of environmental infrastructure.

He has served as a project manager for over 400 cost-of- service and rate studies for water, wastewater, storm water, reclaimed water and solid waste utilities, including development of financial plans, cost of service analysis, rate structure design and evaluation, customer affordability, total utility cost of ownership analysis and project reporting. He has also assisted several communities around the country with the establishment of storm water utilities.

David is currently serving on the AWWA Rates and Charges Committee and served as a contributing author for the recent editions of the AWWA Manual M1 – Principles of Water Rates, Fees and Charges.

Experience

Water Rate Study | Village of Glenview, Illinois | Project Manager

David recently served as project manager for a comprehensive water system financial plan and rate study for the Village. The study included a full utility cost of service and water rate study with a specific emphasis on identification and funding of system repair and replacement needs. Additional key focus areas included evaluation of system connection fees, water rate structure design with a focus on the development of appropriate fixed charges and full documentation of customer impacts.

Sustainable Rate Structure Analysis | New York City, New York | Project Manager

Da**vid** served as the project manager for a sustainable rate structure analysis for the New York City Department of Environmental Protection (DEP). The study included the development of alternative water and sewer rate structures and a stormwater fee and utility to support the City's management and improvements within the City's stormwater system. The study included the development of a credit program and implementation plan for phasing the stormwater fee in over a period of time. The study commenced in August of 2020 and was complete in August of 2025.

Water Rate Study | Downers Grove, Illinois | Project Manager

Stantec completed a comprehensive water rate study for the Village of Downers Grove in 2024. David served as the lead on the study which included the development of a long-term financial plan to confirm the ongoing financial health and stability of the water utility. The financial plan was designed to allow for enhanced investment in water system infrastructure and revenue stability. The Village Board adopted the recommendations developed in the study. David has assisted the Village on prior water rate studies and was project manager for the development of the Village stormwater utility and fee.

Water and Sewer Rate Study | Batavia, Illinois | Project Manager
David served as project manager for a comprehensive water and sewer rate study for the City, including the development of a financial forecasting model, cost of service analysis and water rate structure evaluation. A key component of the study was an evaluation of the City's current rate of reinvestment in the water distribution system and development of a plan to place the City on a realistic reinvestment cycle. The study included the development of a phased approach to increasing water and sewer rates to reduce customer impacts and to confirm the financial health of the City's Water and Sewer Enterprise Fund. David has also managed a stormwater utility feasibility study for the City.

Toho Water Authority, Financial Planning and Rate Studies | Kissimmee, Florida | Project Director
David has served as the Project Director for a number of engagements with the Toho Water Authority. Most recently, he assisted with the development of a water budget-based rate structure for the Authority's commercial reclaimed water irrigation customers. The structure includes irrigation tiers based on landscaped area for each individual customer. The structure was recently adopted by the Authority and is the first of its kind in the State of Florida. David has also assisted with the calculation of the Authority's bulk reclaim water rates and a comprehensive analysis of the utility's system development charges.

Water, Sewer, Stormwater and Refuse Rate Studies | Annapolis, Maryland | Project Manager
Since 2014, David has served as the Project Manager for water, sewer, stormwater and refuse financial planning and rate design studies for the City of Annapolis. The studies have included the development the development of alternative water, sewer and stormwater fee structures to address the City's pricing goals and objectives. The studies have been completed on an annual basis consistent with the City's budget process. Most recently, David assisted the City with an overhaul of the City's stormwater fee structure to bring it into conformance with industry standards.

Water and Sewer Rate Study | Village of South Elgin, Illinois | Project Manager
David served as the project manager for a comprehensive water and sewer rate study for the Village, including development of a financial plan, cost of service and rate study. The Study also evaluated the two sets of rates and fees maintained by the Village resulting from the acquisition of a private water and sewer system located within the Village.

East Bay Municipal Utility District - System Capacity Charge Analysis | Oakland, California | Project Manager
David served as the project manager for the completion of a comprehensive system capacity charge analysis for EBMUD. The study included a detailed analysis of the cost to provide water system capacity to the District's extensive service area and examined potential modifications to the current approach to developing the cost basis for the fees. The study also examined detailed customer usage profiles to facilitate the development of enhanced level of service standards for each customer class including the development of a charge for multi-family based on the size of the dwelling unit. The study investigated several approaches that would allow the District to simplify the current approach to developing and administering the charges.

Prince William Water Fund Balance Target Study & Comprehensive Financial Plan & Rate Study | Virginia | Project Manager
David recently served as Project Manager for the development of a comprehensive reserve policy review and rate study for Prince William Water. The Authority currently maintains four reserve funds including an operating fund, replacement fund, expansion fund and commitment fund. Our project team developed a financial model to assist in the establishment of a target range for balance for each of the funds. David also recently served as the project manager for the completion of a comprehensive financial plan and rate study for the Authority. The study included the development of a long-term financial plan for the Authority along with evaluation of all rates, fees and charges.



Andrew Burnham

Tampa, Florida

Project Role: Financial Technical Advisor

23 years experience

Education:
Bachelors of Business Administration, Lake Superior State University, Sault Ste. Marie, Michigan, 2000

Memberships:
Rates and Charges Committee, American Water Works Association

Financial Accounting & Management Controls Committee, American Water Works Association

Member, Florida Section, Government Finance Officers Association

Member, Utility Resource Management Committee, The National Association of Clean Water Agencies

Management Committee, Water Environment Federation

Trustee of the Management & Leadership Division, American Water Works Association

As VP and Leader of Management and Technology Consulting at Stantec, Andy brings extensive experience conducting and overseeing cost of service allocations, financial planning analyses, and feasibility studies. His expertise includes rate studies, capital funding optimization, economic impact analysis, affordability analysis, business case evaluation, life cycle and replacement cost analysis, benchmarking, as well as technology planning and implementation. In the past five years alone, Andy has been involved with more than 500 studies for more than 150 local governments and supported clients in the issuance of more than $4 billion of debt financing for projects. He has also provided expert testimony for utility-rate-related regulatory proceedings in multiple states and before the Federal Energy Regulatory Commission.

Experience

Water Resources, Stormwater, and Sanitation Rate Studies | City of St. Petersburg, Florida | Project Manager
Andy created an innovative, data-driven method to understand the impacts of implementing a tier-based rate structure. The method captured the impervious area for about 1,300 residential properties and verified that the properties included in the sample were consistent with the residential property size distribution of the city. The percentage of impervious area to parcel size from the sample was applied to all residential parcels to establish an estimated database for creating a tiered structure and evaluating customer impacts. A novel data visualization approach was used to allow for on-the-fly changes to the rate structure and real time GIS feedback, including a map illustrating the location of residential parcels and bill impacts. The transparency helped to build consensus and support for the program.

Water & Sewer Rate Study | City of Rockville, Maryland | Project Director
Given the current utility service structure, the City faced the challenges of managing and communicating within a service area where next door neighbors pay different water bills based on the service provider. The study incorporated a full revenue sufficiency analysis which included the development of a multi-year plan of water and sewer rate revenue increases that would satisfy the annual operating, debt service, and capital costs of the utility, as well as the establishment and maintenance of adequate reserves. He helped develop recommended rate structures to conform rates to accepted industry practice and reflect a fair and equitable distribution of system costs while providing adequate fixed cost recovery, preserving affordability for low volume and average users, and providing a price incentive for water conservation from higher volume users.

Stormwater Rate & Service Assessment | City of Ann Arbor | Ann Arbor, Michigan | Project Manager
Andy reviewed the level of service being provided in this comprehensive stormwater rate and level of service assessment. He looked at multiple areas and identified alternative options along with their corresponding cost and rate implications. Additionally, Andy conducted a series of interactive work sessions with representatives of various customer groups within the community to prioritize the identified level of service enhancements.

Town of Cary | Cary, North Carolina | Project Director

Andy served as the project director of a multi-year, web-based FAMS forecasting model, leveraging the Town's existing Excel financial modeling tools, to aid in the on-going General Fund financial planning efforts. FAMS modeling provided long-term projected impacts to 1) choose the appropriate timing of a $225M voter approved bond referendum to pay for transportation and parks & recreation projects, 2) set goals for multiple level of service assumptions and 3) understand reductions to revenues. Customized models were developed for spreading the voter approved bond issuance into four separate issuances. With enough reserves in place to cover the costs of design and initial build, the Town was able to understand the benefit of delaying the issuance and relieving other constraints due to high levels of service and possible reductions to revenues. Customized modules were built to project the cost impacts of varying levels of service and simulate different degrees of revenue reductions. Models provided robust scenario-generating capabilities including property value forecasting. The Town could understand necessary property tax adjustments when considering each potential level of service and each scenario of revenue impacts. Our FAMS model allowed exporting of several key outputs into formatted Excel workbooks demonstrating the details, such as, the tax rate impact by bond issuance to determine the cumulative tax rate and tax bill impacts to a set of predesignated properties under each scenario.

Rate Study and Financial Feasibility Services | Detroit Water & Sewerage Department (DWSD) | Detroit, Michigan | Project Director

The DWSD provides water distribution, sanitary sewage and stormwater collection services to nearly 700,000 residents in the City of Detroit. In 2013, a Federal judge awarded DWSD administrative quasi-independence from the City. In 2016, regional water, wastewater, and stormwater system assets built by DWSD and serving 126 municipalities in 7 southeast counties were divided between DWSD and the Great Lakes Water Authority (GLWA). Regional water and sewer infrastructure, as well as water and wastewater treatment facilities, are leased to GLWA. The bifurcation agreement between DWSD and GLWA includes a $50 million annual lease payment for 40 years to replace and rehabilitate DWSD's aging water and sewer system. As Project Director, Andy helped guide evaluating a lifeline rate to enhance affordability as well as evaluating a more equitable basis of sewer charges that considered outdoor water uses.

Water and Wastewater Cost of Service Study | City of Cleveland | Cleveland, Ohio | Project Director

Andy oversaw all work completed during this comprehensive cost of service and rate study for the City's water and wastewater utilities. He provided guidance relative to developing alternative 10-year financial management plans, reserve policies, and capital funding strategies. Andy also directed the completion of benchmarking activities relative to infrastructure spending for underground assets.

Comprehensive Water, Sewer and Solid Waste Cost of Service and Rate studies | City of Tempe | Tempe, Arizona | Project Manager

Andy is managed ongoing Water and Sewer Rate Studies for the City. The studies include developing several alternative multi-year financial plans and corresponding annual rate adjustments. Also included was a detailed cost of service allocation analysis and rate design study, which resulted in adjustment recommendations to enhance specific linkages to cost of service and consider reasonable irrigation for larger lots sizes while continuing to provide affordability and conservation pricing for excessive use. Finally, the team participated in multiple special-purpose stakeholder meetings to educate the community regarding processes and new rate structures.

Comprehensive Utility Rate Study | City of Olathe, Kansas | Project Director

Andy served as the project director for a Comprehensive Utility Rate Study for the City. For each service – including Solid Waste, Water, Sewer, and Stormwater – we developed customized financial models including ten-year financial plans and identification of alternative plans of rate adjustments, reviews of alternative capital spending and operational scenarios, and other sensitivity analyses. Andy provided guidance to support the detailed cost allocation analyses for each fund, and development of alternative rate structures to confirm the City is charging fair and equitable rates for each service.

Water & Sewer Cost of service Rate Study | City of Manistee, Michigan | Project Manager

Andy was project manager for the City's first ever comprehensive water and sewer cost of service rate study. A detailed cost of service allocation was prepared to determine proper allocation of costs between the water and sewer systems, and the users of each system located within and outside of the City.



Cole Sullivan

Denver, Colorado

Project Role: Project Manager

4 years experience

Education:

B.S.B.A Finance and Accounting, University of Colorado, Boulder, Colorado, 2021

Cole is a financial and management analyst and provides strategic and comprehensive financial modeling and funding services tailored to each client. Cole combines his knowledge of industry trends, and financial and accounting acumen to create timely and useful solutions to a variety of operational, capital planning, and revenue sufficiency challenges for water, wastewater, and stormwater utilities. Cole's work experience includes front to back support in revenue sufficiency studies, rate design studies, cost of service analyses, and support in securing funding from diverse sources.

Most recently, Cole worked in Washington, DC with Deloitte Consulting providing financial, analytical and technical, and regulatory knowledge on a variety of energy projects. Additionally, his work included implementation of strategies to procure clean energy while maintaining level of service and mission security requirements.

Experience

Water & Sewer Rate Study | Village of Bartlett, Illinois | Project Manager
As Project Manager, Cole led a comprehensive rate study evaluating sufficiency of water and wastewater enterprise fund revenues. He allocated system costs in a thorough cost-of-service analysis to inform class rates and support rate structure modifications for water and wastewater.

Federal Funding Strategies & Financial Analysis | Waterlink Communities | Illinois | Program Manager
Cole served as financial program manager engaging various stakeholders to secure $300M in Federal Water Infrastructure and Financing Innovation Act Funding for clients. Additionally, Cole worked to project 35 years of cashflow for three members to determine financial feasibility of debt financing.

Revenue Sufficiency Study | City of Elgin, Illinois | Financial Analyst
Cole worked with Utility staff to create a long-term, over 25 year, financial forecast for water and sewer rates considering the capital needs to replace lead service lines and meet regulatory compliance standards. The resulting funding program considered diverse funding sources including Illinois Environmental Protection Agency borrowing and traditional debt financing.

Albuquerque Bernalillo County Water Utility Authority, New Mexico | Financial Analyst
As Financial Analyst, Cole analyzed billing datasets of millions of water bills to identify trends in customer behaviour and understand system usage characteristics using Microsoft Access and SQL queries resulting in identifying excess water users to be integrated into the utility water smart conservation programs targeting a 10% water conservation increase over the next decade

Water, Wastewater, & Stormwater Revenue Study | City of Englewood, Colorado | Project Analyst
Performed in-depth analysis of water, wastewater, and stormwater revenue requirements, including operating, capital, and debt service costs. Additionally, Cole worked with the City to prepare funding materials for Congressionally Directed Spending and Drinking Water SRF spending requests.

Alternative Water Source Program | City of Joliet, Illinois | Funding Analyst
Cole developed regional commission member financial pro formas in support of funding applications and commission development for the City of Joliet, IL.

Stormwater Rate Model | Northeastern Ohio Regional Sewer District | Cleveland, Ohio | Stormwater Analyst

Cole developed a 10-year rate model for the Utility's stormwater fund. As part of this Study, Cole reviewed financial requirements of the fund, evaluated alternative capital scenarios, and tested revenue sufficiency across a variety of economic scenarios.

Financial Planning | Pinery Water and Wastewater District | Parker, Colorado | Financial Analyst

Developed multi-year financial plans, determined the costs of providing water by user groups, and evaluated the structure to recover the needed revenue requirements. The study included various scenario analyses related to demand for alternative service levels.

Water Rate Study | Castle Rock Water | Castle Rock, Colorado | Financial Analyst

Created models testing the sensitivity of consumption to adjustments in water rates to evaluate customer response to Castle Rock's drought management plans.

Water & Sewer Revenue Sufficiency Analysis | Town of Windsor, Colorado | Financial Analyst

Performed annual update of water and sewer revenue sufficiency study, including system development fees, to assist the Town in achieving its financial goals and executing on its capital plans. Additionally, developed a novel storm drainage model for the Town's needs.

Water Impact Fees | City of Brighton, Colorado | Financial Analyst

Determined appropriate water impact fee as part of larger update to the City's finance and rate plan. Evaluated the adequacy of the City's current tiers to achieve conservation goals.

Comprehensive Financial Services | City of Palm Coast, Florida | Financial Analyst

Completed four analyses for the City including a revenue sufficiency study, a cost-of-service analysis, a rate design study, and a capital facilities charge study.

Annual Financial Updates | City of Coral Springs, Florida | Financial Analyst

Updated annual financial models and performed capital scenario analysis to measure impacts of PFAs compliance on system rates.

Funding Application Support | Grand Prairie Water Commission | Chicago, Illinois | Funding Analyst

Cole developed regional commission member pro formas in support of funding applications, including IEPA project plans, and commission development for various communities in the greater Chicago area.

Annual Financial Updates | City of Olathe, Kansas | Quality Control

Acted as an independent quality review for financial updates performed by the City in Stantec's financial model(s).

Water & Sewer Revenue Sufficiency Analysis | City of Venice, Florida | Financial Analyst

Prepared revenue sufficiency analysis for the City to determine the water and sewer fund's ability to pay for current capital improvement program. Evaluated the utility's ability to fund needed infrastructure improvements from infrastructure scorecard analysis. Performed a rate survey, comparing the City's utility rates to other local communities.

Revenue Sufficiency Analysis & Long-Term Financial Planning | City of Cape Coral, Florida | Financial Analyst

Performed a revenue sufficiency study and continued development of a 10-year financial plan as well as a cost-of-service analysis for the City based on the results of the RSA.



Carol Malesky

Cleveland, Ohio

Project Role: Quality Control

25 years experience

Education:
MS, Economics, Colorado State University, Fort Collins, Colorado, 1995

BS, Economics & Business Management, Cornell University, Ithaca, New York, 1992

Memberships:
Member, American Water Works Association

Member, Water Environment Federation

Carol has over 25 years of expertise assisting water, wastewater, and stormwater utilities with financial analyses. She has managed dozens of utility financial planning, impact fee, and rate studies for utilities ranging from small water companies to large municipalities. She's also successfully facilitated workshops with multiple stakeholder groups. Carol has presented before numerous utility boards and city councils and has contributed to various rate manuals produced by the American Water Works Association (AWWA) and Water Environment Foundation (WEF) rate committees, including the WEF green infrastructure implementation manual and is currently a chapter lead for the new AWWA system development charge manual. As an economist, Carol strives to apply sound economic principles to management and financial consulting challenges for her water and wastewater industry clients.

Experience

Cost-of-Service Rate Study & Affordability Analysis | Northeast Ohio Regional Sewer District | Cleveland, Ohio | Project Manager
Carol managed the development of strategies to eliminate, mitigate, and/or avoid the impediments to a plan of continuous future rate adjustments. While user rates were evaluated from a cost-of-service perspective, the largest task was to develop strategies to directly confront the issue of affordability. Carol presented results before numerous senior staff meetings as well as Board workshops to assist the District in its understanding of affordability in tandem with rates. Carol assisted with public focus groups and surveys soliciting customer feedback on preferences for services. She managed the analysis and compilation of observations regarding the research on a better understanding of affordability of wastewater service in Northeast Ohio and the greater Cleveland area.

Water & Wastewater Cost-of-Service Rate Study | Albuquerque Bernalillo County Water Utility Authority | Albuquerque, New Mexico | Project Manager
Carol led the effort to help the Authority reach its water conservation goals by developing a new rate structure. She also helped the Authority revise its reuse water rates as part of its Water Resources Management Strategy and developed a long-term financial plan for its water and wastewater utilities. She continues to provide on-going support to develop utility expansion charges and asset valuations, wholesale water rates, and updating the cost-of-service models for water and wastewater rate development. Recent challenges facing the Authority include funding aging infrastructure needs and communicating the need for increased user rates as a result to the Authority's stakeholders.

Financial Planning & Cost-of-Service Rate Study | Butler County Water & Sewer Department | Butler, Ohio | Project Manager
Carol managed water and wastewater utility capacity fee studies for the county. She developed alternative rate structures and a systematic evaluation process with stakeholders. Carol aided in ongoing retail water and wastewater cost-of-service financial and rate analyses. She also assisted in a major wholesale water rate litigation with the County's water supplier and provided litigation support and damages calculations for a water line break dispute.

Cost-of-Service Rate Study | Mobile Area Water & Sewer System | Mobile, Alabama | Project Manager
Carol managed a comprehensive cost-of-service study focused on wholesale customer rates. She also provided quality control and guidance in preparing a long-term financial planning framework for Mobile Area Water and Sewer System (MAWSS) in response to findings of a gap analysis. She assisted the team in workshops with Finance Committee members and MAWSS staff that facilitated long-term financial planning, explicit capital budgeting and reporting, concise reporting, timely Board input into budgeting, and allocations of costs between water and wastewater. Key performance indicators such as percentage reduction in O&M from prior years, revenues versus budgeted revenues by month, actual capital and expenditures versus budget are used to track the framework's effectiveness. Carol manages analysis of funding options for MAWSS' Master Plan.

Financial Analysis & Capability Assessment | City of Lancaster, Pennsylvania | Project Manager
Carol managed the long-term financial analysis and baseline financial capability assessment (FCA) for the City's combined sewer overflow (CSO) consent order requirements. The study was completed in three months and included financial impacts for the City's wholesale sewer authorities. Carol also led the team that prepared the pro forma component of the City's successful application for a WIFIA loan.

Financial Planning & Rate Study | Mahoning Valley Sanitary District | Niles, Ohio | Project Manager
Carol managed a long-term financial planning and rate study for the District. The District is unique in that it is a wholesale water provider to the Cities of Youngstown and Niles, Ohio, and the Village of McDonald. The analysis focused on achieving the District's financial policy targets such as days cash on hand, debt service coverage ratios, and percent of capital improvement program funded by cash versus debt.

Wastewater Rate Design | Plum Creek Water Reclamation Authority | Castle Rock, CO | Project Manager
Carol conducted wastewater rate design analysis to determine a cost-sharing approach for a regional wastewater authority. She also revised the Authority's capital replacement planning model to estimate annual replacement costs and determine annual deposits to the capital replacement fund from user charges. Carol continues to provide ongoing services on an as-needed basis to address any needs related to the Authority's rate models and rates.

Rates & Fees Study and Financial Review | Town of Castle Rock, CO | Project Manager
Initially, Carol managed the comprehensive water, water resources, stormwater, and wastewater rate and fee study, including system development fees, water resource fees, long-term financial plans, cost-of-service rate models, and water budget rate structure development. The stormwater development impact fee and rate calculation included a thorough review of impervious areas and costs of service. Carol completed annual updates to rate and fee studies including incorporating a new financial accounting system with chart of accounts, presented findings before Town Council, and participated in defending the fee approach before the Home Builders Association. Recently, Carol led financial review services for CRW during its annual rates and fees study, providing policy, data, and methodology review.

Stormwater Assessment | City of Peoria, Illinois | Project Manager
Carol managed the financial analysis of the stormwater program assessment. She collaborated with the City's engineers to evaluate program costs and prepared potential funding scenarios. Carol presented funding options at a meeting with the City's customer advisory committee on the stormwater program.

Water, Reclaimed Water, & Wastewater Cost-of-Service, Rates and Fees Study | City of Flagstaff, AZ | Project Manager
Stantec completed a comprehensive financial planning, cost of service, and rate design study for the City of Flagstaff Water Services. Carol served as the project manager for the 18-month study. Work included workshops with Water Services, the Water Commission, and City Council. Numerous alternative rate scenarios were evaluated with Staff and City Council. Carol also facilitated rate review sessions with the City's largest utility customers to assist in communicating the methodologies and results to those users most impacted by the results.

Utility Rate & Financial Consulting Services | Toho Water Authority | Kissimmee, Florida | Financial Services Manager
Carol has managed a wide range of financial consulting services for Toho including proactively managing long-term rate revenue impacts of its operational costs and CIP funding through revenue sufficiency analyses. She managed system development charges and policy changes to equitably recover growth-related costs from new customers. Carol also measured affordability KPIs and reviewed Toho's customer assistance program options to enhance equity and affordability. Over the past few years, she has helped prepared financial modeling tools for Toho to evaluate the financial feasibility of integrating another utility's water and wastewater systems, which is currently in the implementation phase.



Nick Juliano
Tampa, Florida

Project Role: Lead Financial Consultant

5 years experience

Education:

Bachelor of Arts Mathematics, Bachelor of Arts Economics, Westfield State University, Westfield, MA, Massachusetts, 2020

Nick is a Financial Analyst with the Stantec Financial Services team and has more than five years of municipal financial consulting experience. He has become one of the leaders of our Special Assessment programs with a focus on fire and stormwater analysis modeling, and the development of fair and legally defensible impact fee studies. Nicholas has served as the Financial Analyst in the development of financial forecasts, impact fee programs, and special assessments using our interactive, decision support modeling process for various public agencies.

He has strong, adaptive financial modeling skills and experience interpreting large data for our clients. He's demonstrated the ability to customize financial analyses to meet client needs and leverage our modeling platform as a powerful consulting tool.

He has strong Excel modeling skills and has experience working with large data sets and financial models, including our proprietary interactive FAMS model and specific property data, billing data and assessment modules.

Experience

Financial Sustainability Analysis | City of Fort Lauderdale | Fort Lauderdale, Florida | Financial Analyst
Nick serves as a financial analyst facilitating the integrated financial sustainability analysis including its General Fund and seven separate major funds (Water/Sewer, Regional Wastewater, Stormwater, Sanitation, Airport, Parking, and Building funds). The City utilizes these analyses to be used for real-time evaluation and understanding for its key services decision processes, as well as annual rate adjustments and financial plan analysis for the funds. He customized individual models for each fund and linked each model together to evaluate and understand a variety of decision alternatives and their current and future consequences to each fund. As part of the City's annual budget process, we perform simultaneous updates to all the models.

Surface Water Assessment Governance and Rate Study Update | Pinellas County Florida | Financial Analyst
Nick is assisting in a comprehensive update to the County's 2013 Surface Water Assessment Governance and Rate Study. Analyzing their current and historical data to find rate adjustment plans that support the fund while also being equitable to the resident. The client intends to adopt a multi-year rate plan, thus the analysis and projection is vital. Nick has worked with the client closely to run numerous scenarios to verify all avenues have been pursued and collaboratively the rate plan is decided upon.

Integrated Financial Analysis | Lake Worth Beach, Florida | Financial Analyst
Nick is currently serving as the Financial Analyst for a comprehensive financial analysis for the City's General Fund and Enterprise Funds. The study includes the development of financial plans for the City's funds as part of the budget process. In addition, he is managing the completion of a financial feasibility study for the City's water, sewer and electric funds in support of a revenue bond issue.

Utility Rate and Financial Consulting Services | Pasco County, Florida | Financial Analyst
Nick serves as the financial analyst for Stantec's financial consulting services for Pasco County. In this role he has assisted developing the County's water, wastewater and reclaimed utility financial sustainability model, performed annual revenue sufficiency analyses, which helped develop a 10-year financial management plan for the utility and identified needed rate adjustments.



Ryan Thiele

Madison, Wisconsin

Project Role: Financial Analyst

1 year experience

Education:

Master of Public Affairs, Robert M. La Follette School at UW-Madison, Madison, Wisconsin, 2024

Bachelor of Arts in Political Science and Legal Studies, University of Wisconsin-Madison, Madison, Wisconsin, 2022

Ryan has a year of experience as a Financial Analyst with the Stantec, aiding public water, wastewater, and solid waste utilities with financial modeling and forecasting. Ryan utilizes strong Excel skills and his knowledge of large datasets to conduct revenue sufficiency, cost of service, and rate design analyses. Ryan values adaptability and prides himself on being able to meet client needs no matter how unique, utilizing Stantec's powerful modeling platform to deliver high quality work.

Ryan is a master's graduate from the University of Wisconsin-Madison, where his degree focus was on Utility Ratemaking and Finance. There he conducted research on customer affordability, which was published in the American Water Works Association Journal, and was project manager for a utility performance capstone study for Wisconsin's Public Service Commission.

Experience

Water & Sewer - RSA, COSA, RD, SDF | Parker Water and Sanitation District | Parker, Colorado | Financial Analyst

Ryan serves as a financial analyst for Parker Water & Sanitation District, developing annual revenue sufficiency (RSA) and rate design (RD) analyses, with a cost of service (COSA) and system development fee (SDF) analyses every three years. The annual updates, with occasional cost of service analyses and fee design, assist Parker in creating sufficient reserve funds that support resource management and long-term infrastructure, minimizing the financial impact to residential customers when possible. Ryan has also assisted in developing fund schedules for Parker's participation in the Platte Valley Water Partnership. These schedules combine irrigation, municipal, and commercial accounts, and coordinate long-term debt financing to fund future infrastructure. These schedules will be used in Colorado's Water Court for expanding water rights.

Water & Solid Waste - Cost of Service | City of Columbia | Columbia, Missouri | Financial Analyst

Ryan is a financial analyst for the City's cost of service studies for water and solid waste utilities. Working within a unique and unified rate structure, Ryan has developed numerous workbooks that evaluated customer billing data in relation to varying peak factors. The City's data often required more rigorous analysis investigating winter averages and crafting rates that accommodated irrigation seasons. Extensive conversations with the City also confirmed that their large airport customer was being billed fairly, given that the account's usage was also utilizing another water system. Ryan assists in a larger cost of service analysis for the City's solid waste utility to lead to long-term financial sustainability for recycling and landfill programs in the face of large-scale infrastructure improvements, such as the rebuilding of a material recycling facility following a natural disaster.

Revenue Sufficiency Analysis & Rate Design | City of Oak Park Heights | Oak Park Heights, Minnesota | Lead Analyst

Ryan served as the Lead Analyst on the City's revenue sufficiency analysis for its water and sewer utilities, working with City staff on developing various scenarios that address the City's need for PFAS treatment and reconciling it with construction costs that far outpaced revenues. The scenarios developed with City staff led directly to alternative rate design options that gave the City flexibility in funding PFAS treatment and other critical capital needs.