

**LAMORINDA FEE AND FINANCING AUTHORITY (LFFA)
MEETING AGENDA**

Monday, December 1, 2025, 2:05 PM

**County Supervisor District 2 Office
3338 Mt. Diablo Boulevard
Lafayette, CA 94549**

AGENDA

1. **Call to Order the Lamorinda Fee and Financing Authority (LFFA)**
2. **Roll Call**
3. **Adoption of the LFFA Agenda**
4. **Public Comment**
5. **Consent Calendar:**
 - a. June 2, 2025 Minutes
Recommendation: Approve
6. **Old Business:**
 - a. Authorization to Release Funds for the Lamorinda Development Mitigation Fee Nexus Study Update
Recommendation: Authorize the release of \$170,436 in LFFA funds, which includes a 15% contingency, to prepare the Lamorinda Development Mitigation Fee Nexus Study Update.
7. **New Business**

None
8. **Adjourn LFFA Meeting to Monday, January 5, 2026 2:30 p.m.**

I, Patrick Golier, Transportation Program Manager, declare under penalty of perjury under the laws of the State of California that this regular meeting agenda has been posted at least 72 hours in advance at the Lafayette City Offices, 3675 Mount Diablo Boulevard, Lafayette, California in the glass case and on the City website <https://www.lovelafayette.org>.

Lamorinda Fee and Financing Authority

Location of Agendas and Agenda Packets: Agendas and packets are available for review by the public by following this link: <https://swatcommittee.org/lffa-meetings/> and during regular business hours at the Lafayette City Offices, 3675 Mount Diablo Boulevard, Lafayette, California. Agendas and packets shall be made available at least 72 hours in advance of regular meetings and 24 hours in advance of special meetings.

Any writings or documents pertaining to an open session item provided to a majority of the Lamorinda Fee and Financing Authority less than 72 hours prior to the meeting, shall be made available for public inspection at this link: <https://swatcommittee.org/lffa-meetings/> and at the Lafayette City Offices, 3675 Mount Diablo Boulevard, Lafayette, California 94549.

MEETING MINUTES

LAMORINDA FEE AND FINANCING AUTHORITY (LFFA) MEETING AGENDA

Monday, June 2, 2025, 2:05 PM

County Supervisor District 2 Office
3338 Mt. Diablo Boulevard
Lafayette, CA 94549

1. **Call to Order the Lamorinda Fee and Financing Authority (LFFA)** – Member Jim Cervantes called the meeting to order at 2:07pm
2. **Roll Call – LFFA Members Present:** Board Member Jim Cervantes, Lafayette; Kerry Hillis, Moraga; Brandyn Iverson, Orinda. Staff Present: Patrick Golier, Lafayette, Nate Levine, Moraga, Sivakumar Natarajan, Orinda.
3. **Adoption of the LFFA Agenda – M/S/U**
Cervantes moved and Hillis seconded. The LFFA unanimously adopted the agenda.
4. **Public Comment** - None
5. **Consent Calendar:**
 - a. February 3, 2025 Minutes
Recommendation: Approve
Cervantes moved and Hillis seconded. The LFFA unanimously adopted the Consent Calendar.
6. **Old Business:**
 - a. Lamorinda Development Mitigation Fee Program – Nexus Study Update
Action: Receive report from LFFA staff and provide feedback on a draft scope of work for an update to the Lamorinda Nexus Study.

Staff presented a draft scope of work for updating the Lamorinda Nexus Study, last updated in 2015. The discussion emphasized the need for a flexible, legally defensible framework for transportation impact fee uses, that reflect compliances with state law, current development expectations and RHNA requirements.

Lamorinda Fee and Financing Authority

Key discussion themes that were discussed and will be included for consideration in the next iteration of the Nexus Study include:

- Questions regarding possible transit-oriented development (TOD) exemptions and their impacts on fee revenues.
- RHNA-driven housing growth requirements and possible limitations to collect sufficient fees due to streamlined, ministerial approvals.
- The importance of evacuation-related infrastructure and smart traffic signals as eligible projects.
- Legal limitations and potential avenues for conditions of approval to supplement mitigations.
- Coordination of LFFA development fees with other fees that are collected by each jurisdiction

There was consensus to proceed with the RFP process, with a future agenda item to approve the consultant and associated budget once proposals are received. No formal vote was taken.

7. New Business:

- a. Staff update: 2024 Basic Financial Statements and Independent Auditor's Report and Communications
Recommendation: Receive and file.

Tim Przybyla described the audit of LFFA financial statements for the fiscal year ending June 30, 2024. Mr. Przybyla reported that for the year ending June 30, 2024 the net position totaled \$316,774, reflecting the \$1,394,200 contribution as the local match to the CCTA Smart Signals project.

No approval from the LFFA Board is required for the Audit.

- b. LFFA Funding Request: Lamorinda Spirit Van
Recommendation: Staff requests that the LFFA Board approve a distribution of \$20,000 from the Town of Moraga's regional LFFA fund for the Lamorinda Spirit Van Senior Transportation Program.

Legal counsel for the Town of Moraga confirmed that the use of Moraga's share of LFFA regional funding to maintain Spirit Van operations is a valid use of the funds.

Hillis moved and Iverson seconded. The LFFA unanimously adopted the request from the Town of Moraga to fund their annual contribution to the Lamorinda Spirit Van as a distribution from their regional LFFA fund.

8. Adjourn LFFA Meeting at 4:00 p.m. to Monday, July 7, 2025, 2:30 p.m.

Lamorinda Fee and Financing Authority

December 1, 2025

To: LFFA Board

From: LFFA Technical Advisory Committee (TAC)

**Subject: Authorization to Release Funds for the Lamorinda Development
Mitigation Fee Nexus Study Update**

Staff Recommendation

Staff recommends that the LFFA Board authorize the release of \$170,436 in LFFA funds, which includes a 15% contingency, to prepare the Lamorinda Development Mitigation Fee Nexus Study Update.

The contingency of \$22,231 would only be used for potential scope amendments subject to LFFA TAC approval. If needed, staff would seek further approval from the LFFA board for use of these additional funds.

Background

The current Lamorinda Development Mitigation Fee Nexus Study was last updated in 2015, following the original 1998 study. In 2024 the LFFA Board discussed the need for an update, directing staff to prepare a new scope of work to reflect updated development forecasts, multimodal transportation priorities, and recent legal and policy changes affecting impact fee programs.

At its meeting of June 2, 2025, the LFFA Board reviewed and provided input on a draft scope of work for the Nexus Study update. Based on that direction, staff finalized and released a Request for Proposals (RFP) on August 11, 2025, with proposals from interested consultants due by September 19, 2025.

Discussion

One proposal, submitted by Fehr & Peers, was received in response to the RFP. Fehr & Peers is a transportation planning and engineering firm with extensive experience preparing impact fee nexus studies throughout California. The LFFA Technical Advisory Committee (TAC) reviewed the proposal and had a conversation with key staff from Fehr & Peers as part of the review process. Although only one proposal was received, staff have determined that the proposal meets all requirements of the RFP, the consultant demonstrates a clear understanding of the project objectives and provided a fair and reasonable cost proposal for the work to be conducted.

Lamorinda Fee and Financing Authority

The total proposed not to exceed fee for this effort is \$148,205, with staff requesting an additional \$22,231 in contingency funding (15%). The contingency would only be used for potential scope amendments or additional analysis requested by the LFFA Board or TAC during the course of the project.

The Nexus Study Update will ensure that the LFFA's impact fee program remains legally defensible, equitable across jurisdictions, and aligned with current development forecasts and transportation priorities through 2050.

Fiscal Impact

The total amount requested from the LFFA fund balance is \$170,436, of which \$148,205 is for the base contract with Fehr & Peers, and the remaining \$22,231 represents a 15% contingency to be administered by the LFFA TAC for approved scope amendments.

Sufficient funds are available in the LFFA account to cover this expenditure. As of June 30, 2025, the LFFA balance is \$479,981.17.

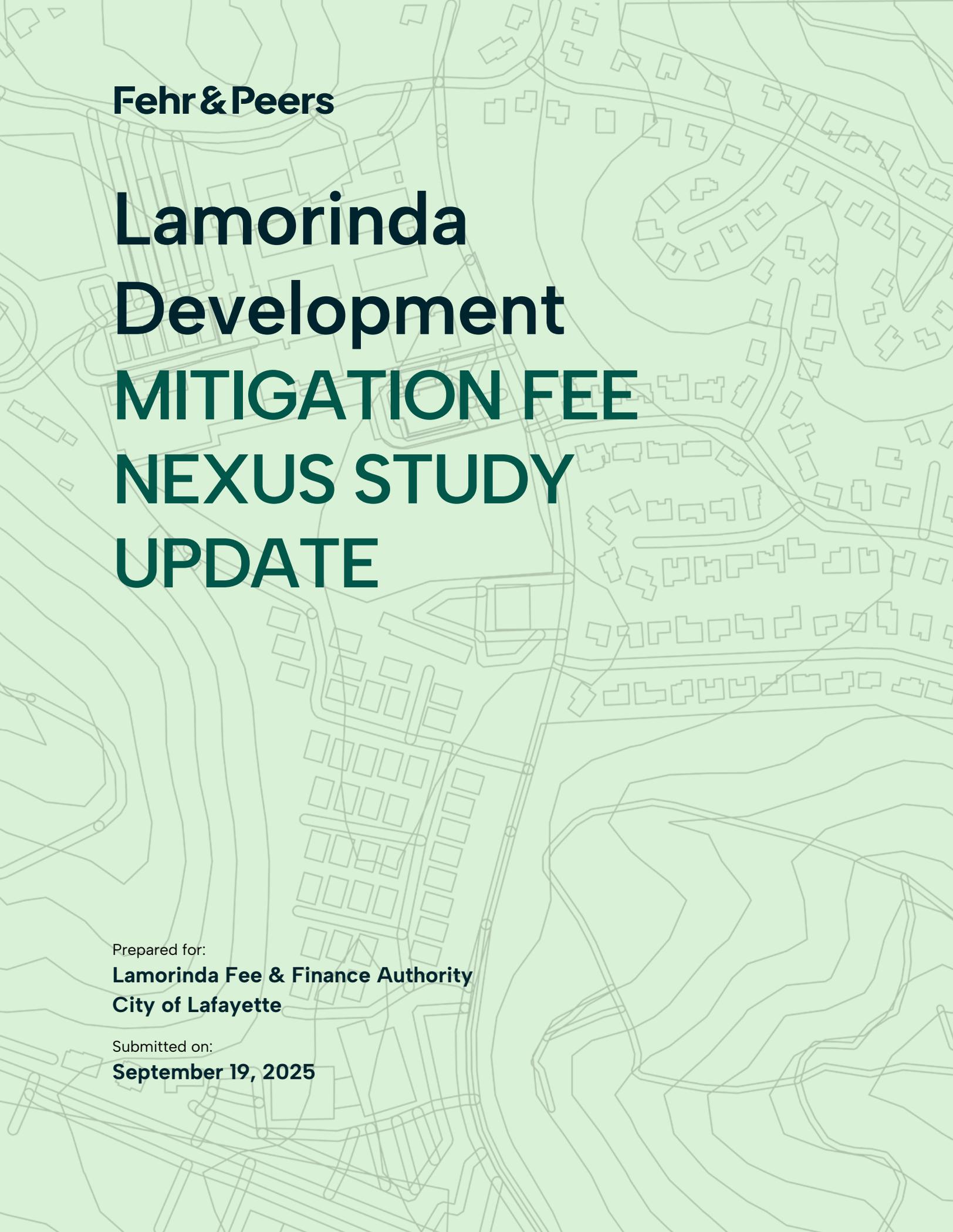
Next Steps

Upon Board authorization, staff will execute a professional services agreement with Fehr & Peers on behalf of the LFFA and initiate the Nexus Study Update. The project is expected to take approximately 14 months to complete, including a presentation of findings and a recommended updated fee schedule to the LFFA Board.

Attachments:

1. Consultant Proposal – Fehr & Peers (September 2025)
2. LFFA Nexus Study Update RFP (August 11, 2025)

ATTACHMENT 1
Consultant Proposal



Fehr & Peers

**Lamorinda
Development
MITIGATION FEE
NEXUS STUDY
UPDATE**

Prepared for:
**Lamorinda Fee & Finance Authority
City of Lafayette**

Submitted on:
September 19, 2025

September 19, 2025

Patrick Golier, Transportation Program Manager
Lamorinda Fee & Finance Authority | City of Lafayette
Engineering Services Department
3675 Mt. Diablo Boulevard, Suite 210
Lafayette, CA 94549

**Subject: Proposal to Provide Services for the Lamorinda Development
Mitigation Fee Nexus Study Update**

Dear Patrick:

On behalf of Fehr & Peers, I am pleased to submit our proposal to support the Lamorinda Development Mitigation Fee Nexus Study Update. Our firm was founded in Lafayette in 1985 and has been headquartered in central Contra Costa County ever since; with that long-standing commitment to and knowledge of the local area, combined with deep expertise in transportation impact fee programs, our team is uniquely positioned to deliver a technically sound, legally defensible, and administratively streamlined update that meets the needs of Lafayette, Moraga, and Orinda.

Our proposed approach builds upon the existing program framework while incorporating unique strengths that only Fehr & Peers can offer. On a local level, having just completed the transportation analysis of the housing elements from each of the three local jurisdictions, we understand how to ensure that the Nexus analysis's critical land use inputs are current and accurate, and we have unparalleled expertise with the detailed planning and travel demand modeling tools available for use in Contra Costa. At a broader level, our firm has a strong reputation for completing complex and reliable Nexus studies throughout the state, and we will ensure full compliance with the **Mitigation Fee Act** and recent legislation, including **AB 602**, **AB 3177**, and **AB 2553**, and the implications of the recent **Sheetz v. El Dorado County** decision. Our methodology emphasizes clarity, reproducibility, and practical implementation ideas to support day-to-day use of the program across agencies.

Fehr & Peers brings a multidisciplinary team with extensive experience in nexus studies, VMT analysis, and multimodal planning. I will serve as **Principal-in-Charge**, bringing many years of experience in conducting nexus studies for our East Bay clients, as well as my leadership in SB 743 implementation and VMT analysis. I will be supported by **Bruno Lertora** as **Project Manager** and **Valerie Tan** as **Project Analyst**, whose recent work on the housing elements of all three Lamorinda jurisdictions adds valuable local insight. Our team is committed to collaborating with LFFA staff to refine the scope and deliverables, ensuring they align with your priorities, schedule, and budget. Our firm understands the contract form, conflicts of interest provisions, timeline, and insurance as outlined in the RFP. We appreciate the opportunity to continue our partnership with the Lamorinda communities and look forward to supporting the successful update of this important program.

Sincerely,

Fehr & Peers



Julie Morgan ^{AICP}
**Principal-in-Charge &
Director of Operations**

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Project Understanding & Approach

Understanding & methodology.

The preparation of an impact fee program involves three integrated components:

- The **technical and analytical** component, which defines the fee metric (e.g., trip or VMT basis), updates future growth estimates to a consistent horizon year based on the latest Regional Housing Needs Allocations (RHNA) and development forecasts, identifies and screens capital improvements, updates planning-level cost estimates and external funding credits, and calculates maximum justified fees by land use with clear, reproducible methods.
- The **legal and policy** component, in which compliance with the Mitigation Fee Act (AB 1600) and other recent state legislation such as AB 3177 and AB 602 is ensured, documenting findings of reasonable relationship and rough

proportionality, and addressing recent case law (including *Sheetz v. County of El Dorado*), as well as clarifying policies for credits, exemptions, and fair-share methodologies.

- The **administration and implementation** component, in which fee collection and inter-jurisdictional accounting are streamlined and there is consistency in approach among all the relevant agencies.

The **Lamorinda Development Mitigation Fee Program** has been in place since 1998 and serves the cities of Lafayette, Moraga, and Orinda through the Lamorinda Fee and Finance Authority (LFFA). The most recent comprehensive update was prepared in 2015. Fehr & Peers recently supported the latest **Housing Elements for all three Lamorinda jurisdictions**, giving our team current, working knowledge of each agency's RHNA allocations, land use assumptions, and development pipeline. We will leverage these datasets together with the current General Plan and Capital Improvement Program (CIP) information to ground the nexus analysis in locally accepted growth projections and ensure internal consistency across jurisdictions. This familiarity lets us translate



Housing Element assumptions into fee service units efficiently and focus effort on where methods or data materially affect fee outcomes.

Given that context and the current legal, policy, and market environment, our approach for the 2026 LFFA Nexus Study Update is to refresh rather than rebuild the technical foundation, while placing added emphasis on legal defensibility and documentation, as well as on exploring methodology changes that could lead to a more efficient and equitable program. Concretely, in coordination with LFFA staff, we will confirm whether updates are needed to key methodologies—such as the fee metric and dwelling unit equivalent (DUE) framework; whether to retain a fixed project list or move to eligible categories; and the jurisdictional allocation formulas.

Our detailed scope, staffing, and management plan are outlined in the next section, following the RFP task numbering. We look forward to working closely with LFFA and staff from Lafayette, Moraga, and Orinda in refining this approach so that it aligns with their priorities, schedule, and budget. Checkpoint meetings are embedded at key decision points to keep decisions timely and the effort on schedule.

Approach to work plan.

For consistency with the scope of work outlined in the RFP, our approach to the Lamorinda Development Mitigation Fee Nexus Study Update is described below using the same sequence of task numbers as in the RFP. To achieve LFFA’s goals as we understand them, we have made some minor adjustments to the RFP’s task descriptions. This entire approach is flexible and can be adapted based on input from LFFA staff and local stakeholders.

Comprehensive scope of work.

Task 1. Review Existing Program & Resolve Policy Issues

Fehr & Peers will review the **2015 LFFA Nexus Study** and local policy documents from all three jurisdictions, including **General Plans**, **Housing Elements**, **transportation plans**, and other applicable documents and reports, such as safety, evacuation, and wildfire mitigation plans. Leveraging our recent work on the **three agencies’ Housing Elements**, we will anchor growth assumptions to the latest RHNA allocations, land use assumptions, and development pipeline to ensure consistent inputs across jurisdictions.

We will include a review of the fee calculation methods used in the 2015 study, such as the use of daily trip rates in converting forecasted growth to Dwelling Unit Equivalents (DUEs), and consideration of whether it might be beneficial to adjust those methods. As part of this review, we will assess the adequacy of available modeling tools, such as the CCTA travel demand model, and the data required to establish a transportation facilities fee.

In parallel, we will identify and document legal and policy issues that may affect the update and confirm alignment with the **Mitigation Fee Act (AB 1600)** and applicable state requirements (e.g., **AB 602** and **AB 3177**, as relevant), as well as recent case law, including **Sheetz v. County of El Dorado**. We will capture early policy choices (e.g., trips vs. VMT framing, crediting/offsets, indexing, inter-jurisdictional accounting) so the study proceeds with clear guardrails. Regarding the VMT question, we will discuss with local staff the various ways that VMT can be incorporated into a fee program; this can range from using a development project’s VMT to calculate that project’s fee, all the way to structuring the entire fee program around the goal of VMT reduction. The considerations involved will be discussed with staff (and



ideally also with legal counsel) so they can make an informed decision about the most appropriate way to incorporate VMT concepts into the LFFA program.

To initiate the project, we will hold a kickoff meeting with LFFA and local agency staff to confirm goals, discuss data needs, and address applicable policy issues. Following the meeting, we will issue a consolidated information request and, as needed, refine the scope and schedule. Upon completion of the document review, we recommend having another meeting with LFFA staff and ideally also with legal counsel to look at the findings and discuss what program modifications might be implemented as a result.

Deliverables: Information requests; revised project scope and schedule (as needed), and a brief written summary of the policies and how they may be integrated within the updated Nexus Study.

Task 2. Identify Existing Development, Future Growth & Transportation Network Demand

Fehr & Peers will establish a consistent baseline and growth forecast through 2050 for Lafayette, Moraga, and Orinda. Building on *recent Housing Elements*, we will compile base-year development by land use and jurisdiction; reconcile it with available pipeline information, including projects that are already committed to the current fee levels or that are otherwise exempt from the fee; and align

assumptions with current RHNA allocations, accessory dwelling unit (second-unit) trends, and institutional uses. As part of the scope, we will convene a coordination meeting with LFFA staff to review preliminary baseline and growth projections, confirm data sources, such as the CCTA travel demand model and locally accepted datasets, and agree on the method for converting land use to transportation demand.

We will discuss with staff the DUE methodology and the selected metric (e.g., trips or VMT) and translate land-use inputs into fee units with clear conversion factors. As part of this work, we will update the DUE-related tables from the prior nexus study to reflect current conditions and the agreed 2050 growth. We will also note how streamlined ministerial housing approvals (e.g., **SB 35**, **AB 2011**) may affect fee applicability or collection and flag policy implications for establishing the transportation facilities fee.

Deliverables: Summary table of existing and projected development by land use and jurisdiction. Agreed approach for converting land use data to measure facility demand.

Task 3. Fee Calculation Methodology

Fehr & Peers will reassess and confirm the methodology for calculating maximum-justified transportation impact fees. In the current LFFA program, there is one uniform nexus percentage that is applied across the board to all projects, and that percentage is based on the proportion of the future population in the LFFA area that is new. This is a straightforward approach, although a downside is that it does not account for how different projects in the fee program might have different levels of usage by new travelers. We will discuss other options with the LFFA staff, including the possibility of using a model-based technique (e.g., select link/zone assignment from the CCTA travel model) to capture different usage levels on different

facilities, and will explore the pros and cons of those options to help LFFA staff decide on a nexus approach.

We will evaluate VMT and project trips as potential impact measures and recommend a single approach for the program consistent with the legal guardrails from Task 1; and recalculate DUE conversions based on the growth projections identified in Task 2. We will also establish a clear, fair-share framework that distinguishes projects addressing existing system deficiencies from those serving growth-related needs.

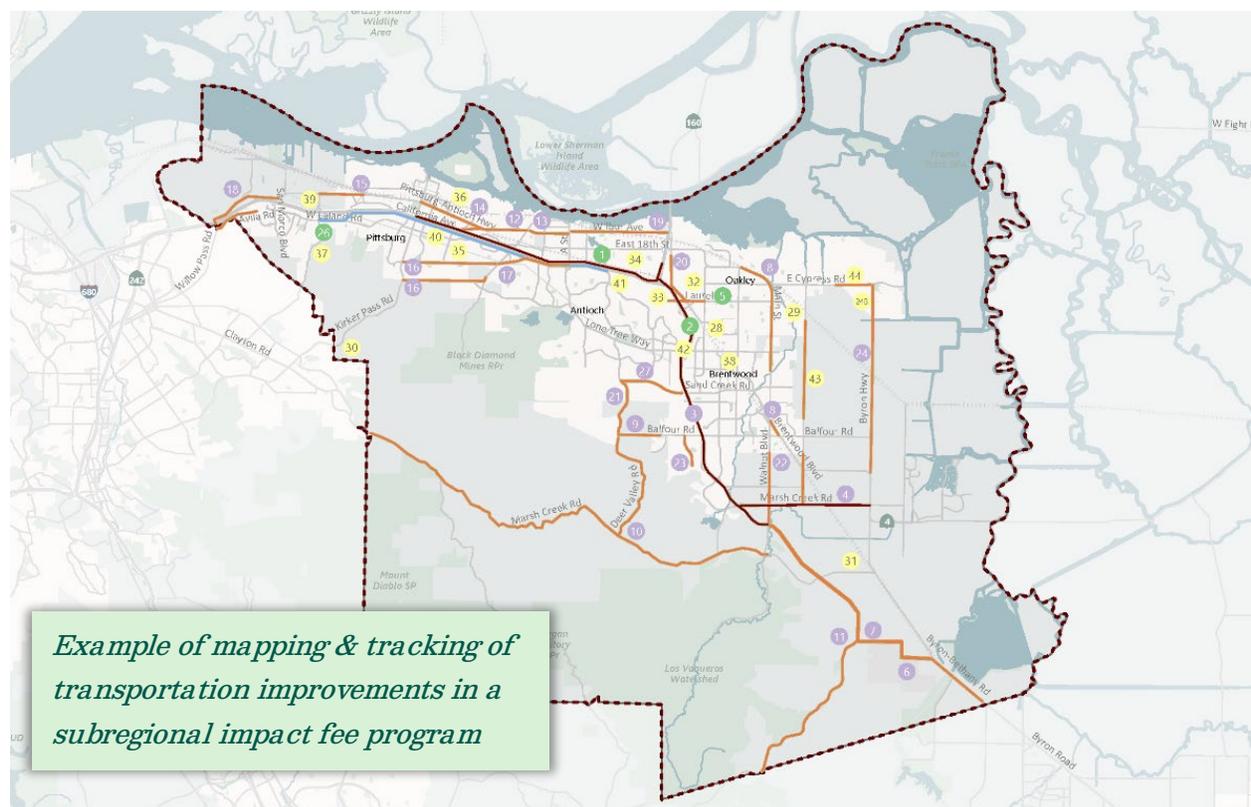
Finally, we will evaluate how current or potential transit-oriented development (TOD) and ministerial exemptions may affect fee applicability and revenue, and document where project-specific conditions of approval—rather than fee funding—are the appropriate tool. All recommendations will be documented to remain consistent with the **Mitigation Fee Act** and relevant case law.

Deliverables: Brief written summary of the recommended fee calculation methodology for confirmation from LFFA staff.

Task 4. Transportation Needs & Improvement Planning

Fehr & Peers will work with LFFA and city/town staff to identify the transportation facilities needed to support growth and, together, determine whether to retain a fixed project list or transition to a set of eligible project categories.

Because the current list and cost assumptions are dated, we will update the improvements list by drawing from existing planning documents, such as each agency's CIP, **Bicycle and Pedestrian Master Plan**, and **relevant TIAs** and **corridor studies**; it is not anticipated that it would be necessary to define new projects from scratch. We will also offer guidance on project inclusion so that the improvement list reflects multimodal priorities.



Shifting to a category-based structure can provide more flexibility to the agencies in using the fee revenues; however, this consideration would need to be balanced with the legal requirements of the **Mitigation Fee Act** and specifically the relatively new requirements from **AB 602**, which states that a nexus study should include a capital improvement program and identify the projects that will receive funding from the fee. If LFFA staff decide that a category-based structure is preferred, we will assist in defining concise eligibility criteria for each category.

Project sponsors will be consulted to gather information about current cost estimates for the projects included in the fee program. In situations where more up-to-date cost estimates are not available from the sponsor, we can apply cost-escalation factors to bring the older costs up to current levels, and we will consult with our design engineers to confirm that the resulting cost estimates are in a reasonable range for improvements of that type. If LFFA staff decide that a more detailed and comprehensive refresh of the cost estimates is warranted, we can engage a local civil/structural engineering partner to develop cost estimates grounded in recent unit costs, bid histories, and regional pricing. We will also establish a durable valuation method, such as an escalation or indexing approach, to keep costs current between comprehensive updates.

The RFP mentioned the potential use of data platforms such as Streetlight for traffic counts and understanding travel behavior. We are well-versed in using Streetlight and other data platforms, such as Replica, and can discuss with LFFA staff the potential uses and costs of such platforms. In our experience, those types of data platforms, while not regularly used in impact fee programs, can help establish existing travel conditions for TIAs, corridor studies, or other planning efforts.

Deliverables: List of proposed improvements (or categories) and associated cost estimates.

Task 5. Funding Considerations

Fehr & Peers will meet with LFFA and agency staff to confirm the typical non-fee funding sources used in Lamorinda and how they are applied, identify funding sources expected to participate in growth-related transportation improvements, and document the assumptions required by the Mitigation Fee Act regarding the anticipated sources and timing of additional funding. We will distinguish funding to remedy existing deficiencies and funding attributable to new development other than impact fees. To address occasional concerns about perceived overlap between LFFA fees and jurisdiction-specific improvements, we will document a clear crediting/offset approach, so developer contributions tied to specific projects are accounted for and double-charging is avoided.

We will compile a concise funding inventory using LFFA and member agency inputs and recent CIPs, categorizing each source as committed, reasonably expected, or potential, and noting approximate timing. Potential sources may include local and regional sales-tax programs, state/federal grants, active transportation and safety programs, and developer agreements. Using this inventory, we will apply non-fee funding to the improvement list or categories before calculating fees.

Deliverables: Section in draft report identifying funding considerations.



Task 6. Jurisdictional Fee Allocation & Prepare Report

To establish the maximum justified or nexus-based fee, we will apply the nexus methodology decided upon in Task 3 to the list of projects identified in Task 4. For the purposes of this scope, we have assumed that LFFA staff will decide to use the current methodology and apply a uniform nexus percentage based on population growth. However, if in Task 3 the LFFA staff decide to apply a more nuanced model-based approach, then this task can be redefined to include a select link/select zone assignment process from the CCTA travel model. Before assigning costs to new development, we will exclude costs tied to existing deficiencies and recognize direct developer contributions where applicable, so new development is not charged to remedy pre-existing shortfalls and double charging is avoided.

Fehr & Peers will translate fee-eligible improvement costs into maximum justified fees by land use and jurisdiction. We will update the jurisdictional allocation formulas to reflect current LFFA accounting practices and ensure allocations reflect actual usage and growth-related demand, rather than jurisdiction size alone. The fee schedule will clearly differentiate between local fees and the regional Lamorinda fee, and we will confirm or revise the formulas presently contained in Appendix C of the current nexus study. If revisions are warranted, we will emphasize a simple, transparent method that fairly assigns costs based on travel demand and DUE growth.

To support clarity and coordination, we will document how the updated LFFA fees interface with existing local development fees in each jurisdiction and provide practical recommendations to minimize duplication and improve transparency. We will prepare fee tables and reproducible worksheets, a concise technical appendix describing the allocation

logic and assumptions, and the nexus findings required for adoption.

We will produce an **Administrative Draft Nexus Report** following one round of jurisdiction staff review of the quantitative analysis and fee schedules; a **Public Draft Nexus Report** following one round of comments on the Administrative Draft; and a **Final Report** reflecting one round of comments on the Public Draft. Electronic copies will be provided for all drafts and the final. If requested, we will furnish legal counsel with example fee resolutions and ordinances from peer jurisdictions.

We will meet with LFFA staff to review the results and walk through allocations, fee schedules, and key policy choices and to capture direction for revisions. We will also attend an LFFA public hearing presentation to present the Public Draft Report and support adoption. Though not included in this initial scope, if desired we can also assist with individual council briefings for each jurisdiction.

Deliverables: Fee schedules, full report drafts, final report, and presentation materials.

Work Plan & Schedule

Our detailed schedule for the proposed scope of work can be found in **Appendix C**.

Team Qualifications

About our firm.

We are a transportation planning and engineering firm with **24 offices** and over **400 staff nationwide**. Since 1985, we have partnered with public and private clients to design safer, more effective ways for people and goods to move—creating spaces where everyone can thrive, today and for generations to come. Bringing together data, technology, and the experiences of the communities we serve, we help clients make confident, well-informed decisions. Along the way, we have earned national recognition for raising the bar on how transportation projects are planned, designed, and delivered. Many of our first clients still trust us with their transportation needs after decades of collaboration—a testament to the strong partnerships we build and the innovative mindset we bring to every project. We do not just follow trends; we help clients anticipate what is next. With a blend of multimodal expertise, national perspective, and local insight fueled by our strong and longstanding relationships, we tailor solutions across a wide range of services to meet each community’s unique needs.

Proposed project team.

With four Bay Area offices and over 100 technical staff, we have the resources to dedicate ourselves to creating quality deliverables for every client who entrusts us with their project. As **Principal-in-Charge**, **Julie Morgan** will utilize her decades-long expertise as a professional planner and a resident of Contra Costa County to ensure the successful delivery of project goals, having recently led updates to both the **East and West Contra Costa County Nexus Study Updates**. **Bruno Lertora** leads our team as **Project Manager**, bringing his own local

Northern California Nexus Studies

- Contra Costa County
- San Mateo County
- Sonoma County
- Solano County
- Santa Cruz County
- Napa County
- City of Oakland
- Town of Tiburon
- City of Ukiah
- City of Foster City
- City of San Rafael
- City of Brisbane
- City of Mountain View
- City of Stockton
- City of Pittsburg
- City of Dublin
- City of Pleasant Hill
- City of Redwood City
- City of Oakley
- City of Fairfield
- City of Suisun City
- City of Pleasanton

experience and understanding through the **Lafayette and Moraga Housing Elements** and the **City of Pleasant Hill Impact Fee Nexus Study**. Experienced staff, **Mackenzie Watten** and **Valerie Tan**, round out our proposed team, with Valerie having worked on housing elements for all three Lamorinda agencies and Mackenzie bringing his expertise in providing similar services for Solano County, San Ramon, Oakland, and Brisbane. Complete resumes are available in **Appendix A**.



Julie Morgan AICP
PRINCIPAL-IN-CHARGE

Bruno Lertora
PROJECT MANAGER

Mackenzie Watten PTP
TECHNICAL ADVISOR

Valerie Tan
PROJECT ANALYST



Julie Morgan ^{AICP}
Fehr & Peers | Principal-in-Charge

Julie has 25 years of experience in a wide range of transportation planning efforts, including travel demand forecasting, long-range plan development, and integrated transportation/land use planning. She develops and applies travel demand forecasting tools in all the major travel demand software packages and manages projects ranging from long-range city-wide circulation plans to traffic impact evaluations to applications of innovative analytical methods for quantifying the effects of neighborhood-scale land use changes on personal travel behavior.

Julie has substantial experience with all the major travel models used in the Bay Area and the Central Valley. She has provided travel demand forecasting services in support of numerous planning and engineering projects, including General Plans, infrastructure development studies, and complex environmental impact reviews. Julie has developed substantial expertise in the field of transportation impact fees, having completed nexus studies in support of legally defensible fee programs for dozens of California cities and counties with populations ranging from 25,000 to 400,000, as well as for several regional financing authorities that involve multiple local jurisdictions.



Bruno Lertora
Fehr & Peers | Project Manager

Bruno is a transportation planner with experience in land use planning, traffic operations, and active transportation planning. As a project manager and analyst, he has participated in and managed multiple transportation impact fee nexus studies across the Bay Area for regional authorities and several cities, covering nexus methodology, demand and land-use inputs, planning-level cost updates, external funding credits, and fee schedule recalibration by land use. He is familiar with Mitigation Fee Act requirements and recent case law, and is a clear, bilingual communicator (English/Spanish) who aligns technical analysis with policy direction and stakeholder priorities.

Bruno brings current, on-the-ground familiarity with Lafayette, Moraga, and Orinda from Fehr & Peers' recent work on each agency's Housing Element (including RHNA allocations, land-use assumptions, development pipelines, and VMT analysis). He will leverage these accepted datasets to anchor growth inputs to a consistent 2050 horizon, ensuring internal consistency across the three jurisdictions and a transparent bridge between land-use planning and the fee program. Bruno will lead coordination with LFFA and city staff, right-sizing the technical effort, and keeping the study on schedule and within budget.



Mackenzie Watten ^{PTP}
**Fehr & Peers | Technical
Advisor**

Mackenzie (“Mac”) leads Fehr & Peers’ Travel Behavior Forecasting Discipline Group, bringing a measured, analytical, and thoughtful approach to understanding how people move from place to place. His recognized expertise has led to his ITE leadership positions on the ITE Post-COVID Travel Behavior Task Force and the Data Committee, where he is investigating travel behavior data availability, quality, procedures, standards, sources, and tools. He has over 15 years of experience contributing his forecasting travel demand forecasting expertise to a wide range of complex transportation projects across the country and around the world. Mac helps clients address tough questions using data, models, and other tools to understand travel behavior and inform planning efforts. He is always thinking about what comes next, helping clients and colleagues alike address and plan for uncertainty.

Mac has worked extensively across the state of California, developing and applying trip and activity-based models at regional and local scales for a wide range of projects, including transit infrastructure planning, smart growth planning, land use modeling, environmental impact assessments, and highway planning. His history of successfully guiding teams through tough projects has resulted in a deep level of trust from clients, who, along with his colleagues, appreciate his candor, thoughtful insight, and affable demeanor.



Valerie Tan
**Fehr & Peers | Project
Analyst**

Valerie is a senior transportation planner with over four years of experience in transportation and land use planning, traffic impact evaluation, and transportation infrastructure projects throughout the Bay Area. Her expertise includes multimodal traffic operations, travel-demand forecasting, and data-driven planning. Valerie has applied traffic operations and travel demand forecasting tools on numerous general plans, land use development studies, and infrastructure development projects to analyze travel behavior and help clients address complex transportation questions. She connects forecasts from travel demand models with detailed traffic operations analysis to inform transportation infrastructure improvements.

Valerie served as the lead technical analyst for the Housing Elements in Lafayette, Moraga, and Orinda, developing and reconciling RHNA allocations, land use capacity, pipeline assumptions, VMT analyses, and supporting evacuation/safety reviews. Valerie will help align the three agencies’ Housing Element assumptions to a common 2050 horizon, translating them into fee service units, and documenting clear linkages between land use, project needs, and the fee schedule.

Related Experience

Fehr & Peers has served agencies in the East Bay from our local office, first located in Lafayette and now in Walnut Creek, for 40 years. There are now more than 100 technical professionals working across all of our Bay Area office locations.

Fehr & Peers has a long history of conducting Nexus studies for development impact fees, a core part of our transportation planning practice since our firm began. We bring together deep knowledge of an agency's local needs and context, combined with rigorous expertise in the legal and analytical requirements of Nexus studies, to produce fee programs that are solid, defensible, practical, and implementable. Recent local examples include nexus studies for the *City of Pleasant Hill*, *City of Dublin*, *City of San Ramon*, and *the East Contra Costa Regional Fee & Financing Authority*. As you will see from the sampling of similar project work presented below, many of our fee program clients choose to work with us over many years and multiple cycles of nexus updates, establishing longstanding relationships and trusting us to build and maintain one of the crucial elements of their infrastructure funding process.

Building upon our extensive experience with classic impact fee nexus studies and our unparalleled expertise in VMT analysis and SB 743 implementation, Fehr & Peers has also recently led several studies of VMT Mitigation Programs, including the *Contra Costa VMT Mitigation Program* feasibility study for CCTA, the *LADOT SB 743 Mitigation Pilot Program*, and the *San Mateo Countywide VMT Mitigation Program* for the City/County Association of Governments in San Mateo.

Best practices for Nexus studies.

The Turner Center at UC Berkeley has prepared several studies of practices and

policy considerations to improve the implementation of fees governed by the Mitigation Fee Act in California, with funding provided by the California Department of Housing and Community Development pursuant to AB 879, which was passed in 2017. Their 2019 report addressed fee transparency, fee structure, the fee design process, and local financing for infrastructure.

A 2020 Turner Center report addressed clarifying requirements around the level of service, linking fees more closely to the direct impacts of new development, and incorporating consideration of feasibility for fees relative to other local entities. It also describes three common methodological approaches used in Nexus Studies: the Planned Facilities Method (Cost of Planned Facilities divided by New Development Demand) as has typically been applied in the LFFA fee program, the Existing Inventory Method (Current Value of Existing Facilities divided by Existing Development Demand), and the System Plan Method (Value of Existing Facilities + Cost of Planned Facilities divided by Existing + New Development Demand).

The most recent 2023 report by the Turner Center identifies a nexus study template that provides a framework that jurisdictions can utilize to adopt or update an impact fee program affecting residential development in accordance with the requirements of relevant sections of the Government Code. The template begins with recommendations regarding the report content, which is followed by eight key steps to be undertaken as part of the Nexus study preparation and the process to adopt or update a development impact fee that will be applicable to residential development.

SUPREME COURT LAWSUIT ON EL DORADO COUNTY FEE PROGRAM

A unanimous 2024 decision of the US Supreme Court in *Sheetz v. El Dorado County* determined that legislatively enacted impact

fees are not exempt from requirements outlined in two previous property rights cases (*Nollan v. California Coastal Commission* and *Dolan v. City of Tigard, Oregon*). The case involved the County of El Dorado’s traffic impact mitigation fee program and the resulting fee that was set by formula based on a nexus study. In this case, a resident argued that the County did not make an individualized determination that an “essential nexus” and “rough proportionality” existed between the traffic impacts caused by his project (constructing a single-family home on his property) and the need for roadway improvements. The California Court of Appeals initially ruled that the Nollan and Dolan “essential nexus” and “rough proportionality” tests do not apply to legislatively enacted exactions, so the impact fee was constitutional. The Supreme Court reversed that decision and remanded the case back to the state Court of Appeals.

In a very recent ruling, the California Court of Appeals looked at the El Dorado County transportation impact fee again and determined that its nexus study did meet the “essential nexus” and “rough proportionality” tests necessitated by the Nollan and Dolan decisions, thus supporting the validity of a common methodological approach to nexus determinations in many California fee programs. Another appeal of this court decision seems likely, and so the “final” word on the specifics of nexus determinations has yet to be written. Regardless, the LFFA nexus study will need to show that the payment of impact fees to obtain a land-use permit has an essential nexus to the government’s land-use interest and that there is a “rough proportionality” between the fee’s burden on the property owner and the transportation effects of the proposed land use. The legal and methodological questions should be discussed carefully with legal counsel throughout the course of the nexus study process.

STATE LAWS

Several new state laws have been adopted since the 2019 Nexus Study that impose new requirements on impact fee nexus studies, including AB 2553 and AB 3177, which were signed in 2024, and AB 602, which was signed in 2021. SB 937 and AB 1820 specify new administrative requirements for fee programs.

AB 2553 (Friedman) expands the definition of “Major Transit Stops” (intersection of 2 or more major bus routes with a frequency of 20 minutes or less during peak commute periods) and requires that fees imposed on housing developments to mitigate vehicular traffic impacts be reduced for projects located within a transit priority area (close to a major transit stop) to reflect a lower rate of auto trip generation.

AB 3177 (Carrillo) similarly requires that a fee on housing development imposed to mitigate vehicular traffic impacts shall be set at a rate that reflects a lower rate of auto trip generation with certain characteristics: located within a transit priority area and the major transit stop is programmed to be completed before or within one year of scheduled completion and occupancy of the housing development, convenience retail uses are located within ½ mile of the housing development, and the housing development provides either the minimum number of parking spaces required by local ordinance or no more than one onsite parking space for 0–2 bedroom units, and two on-site spaces for 3 or more bedroom units, whichever is less.

AB 602 (Grayson) requires that impact fees levied on residential development must be calculated such that they are proportional to the square footage of future units, unless findings are made that such a determination is not appropriate. A nexus study must evaluate how existing and future residential development can be estimated by residential square feet or document that the use of residential square feet is not relevant, as it

would not appropriately reflect the relationship between the fee, facility demand, and residential land use.

SB 937 (Wiener) prohibits a local agency that imposes fees or charges on a residential development for the construction of public improvements or facilities from requiring the payment of those fees or charges until the date of the final inspection or the date the certificate of occupancy is issued, whichever occurs first, except for utility service fees, which the local agency is authorized to collect at the time an application for utility service is received. The act exempts specified units in a residential development proposed by a nonprofit housing developer if the housing development meets certain conditions.

AB 1820 (Schiavo) authorizes a development proponent that submits a preliminary application for a housing development project to request a preliminary fee and exaction estimate, as defined, and requires a city, county, or city and county to provide the estimate within 30 business days of the submission of the preliminary application. The bill would, upon final approval of a housing development project, require the agency to provide the development proponent with an itemized list and a good-faith estimate of the total sum amount of all fees and exactions that will apply to the project within 30 business days of the determination of completeness.

Similar project work.

West Contra Costa Subregional Transportation Mitigation Program Nexus Update

Fehr & Peers served as the prime consultants assisting the West Contra Costa Transportation Commission by preparing a comprehensive nexus study to update the West County transportation impact fee program. As a subregion of Contra Costa County, WCCTC is required by the countywide Growth Management Program to maintain a subregional impact fee program, as a mechanism to ensure that future development pays its fair share toward necessary transportation improvements. The West County impact fee had been in place since 1997 but had not been substantially updated since 2005, and the fee levels had not kept pace with inflation. Fehr & Peers led a comprehensive nexus study, involving

West County STMP Process



★ Input by Technical Advisory Committee (TAC) and the Board

extensive engagement with the local agencies, development of an updated project list, determination of the fair-share nexus relationships, and discussion of options through many presentations to the WCCTC Board.

Client Name: West Contra Costa Transportation Advisory Committee
Location: Contra Costa County, CA
Value: \$250,000

East Contra Costa Regional Fee Nexus Studies and Program Support

Fehr & Peers has been the lead consultant for the East Contra Costa Regional Fee & Financing Authority since 2001, and Julie Morgan has served as the project manager throughout that period. Over the past 15 years, we have completed two Nexus study updates, several status reports on fee revenues and project delivery timelines and provided ongoing advice to agency staff on topics related to fee reductions and waivers, fee calculations for unusual land use types, and program implementation details. The regional impact fee program in East County has been a very successful financing mechanism

supporting the development of several major transportation improvement projects.

Client Name: East Contra Costa Regional Fee & Financing Authority
Location: Contra Costa County, CA
Value: \$500,000+

Solano County Regional Transportation Impact Fee

Fehr & Peers, with Julie Morgan as lead, was a key member of the consulting team charged with developing the first regional transportation impact fee program in Solano County. A successful regional fee program requires cooperation among many local stakeholders, and developing such a program requires thorough technical analysis, compliance with legal mandates, and sensitivity to important local political and economic issues. Fehr & Peers and the rest of the team developed a comprehensive approach to engaging the key stakeholders in a collaborative and informed decision-making process. Fehr & Peers staff were responsible for all the technical analysis required to establish the necessary nexus relationships between capital improvements to be funded and the amount of the fee. This effort required

Experience with housing elements.

Of the over 100 housing elements our staff has worked on, Fehr & Peers has supported updates for Lafayette, Moraga, and Orinda, providing valuable insights into RHNA allocations, land use assumptions, and development pipelines that directly inform nexus study methodologies.

LAFAYETTE HOUSING ELEMENT UPDATE EIR & VMT ANALYSIS

Fehr & Peers assisted the City of Lafayette in preparing the housing element and safety evacuation analysis component of the General Plan Update.

MORAGA ADVANCED PLANNING INITIATIVE

Fehr & Peers worked on the Town of Moraga's General Plan housing element update, climate action plan, and associated updates to the remaining general plan elements, as well as the EIR.

ORINDA PRECISE PLAN

Fehr & Peers prepared the transportation impact analysis for the Orinda Precise Plan EIR. Our work included a VMT impact assessment and a supplemental traffic operations analysis.

extensive use of the Solano–Napa regional travel demand model, combined with the local knowledge and transportation planning expertise of several Fehr & Peers staff. Julie is continuing to work with the Solano Transportation Authority on fee program updates and revenue projections that are being incorporated into a project prioritization process.

Client Name: Solano Transportation Authority
Location: Solano County, CA
Value: \$155,000

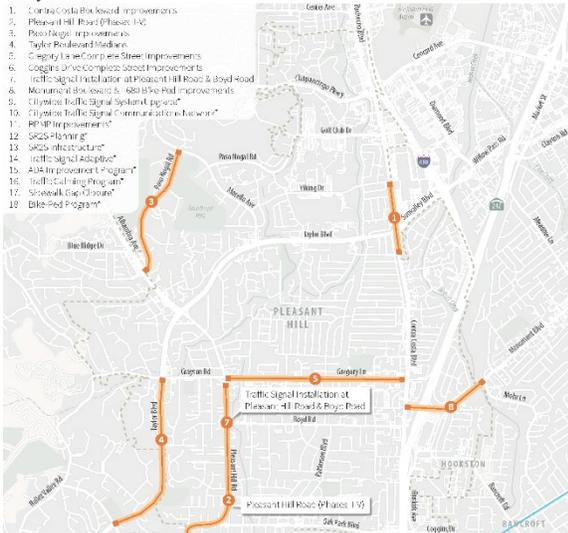
Pleasant Hill Transportation Impact Fee & CIP Update

Fehr & Peers worked with the City of Pleasant Hill to update its transportation impact fee program so that it reflects current capital priorities and growth expectations. The effort incorporated projects from the city’s capital program (including bicycle and pedestrian improvements), aligned land-use assumptions with recent planning work, and recalibrated fees using a clear, project-based nexus consistent with the Mitigation Fee Act.

Client Name: City of Pleasant Hill
Location: Pleasant Hill, CA
Value: \$50,000

Project List

1. Contra Costa Box Road Improvements
2. Pleasant Hill Road Phases 1-6
3. Blue Ridge Improvements
4. Taylor Boulevard Medians
5. Gregory Lane Complete Street Improvements
6. Coggins Lane Complete Street Improvements
7. Traffic Signal Installation at Pleasant Hill Road & Boyd Road
8. Menard Road Road to 680 Bike Path Improvements
9. Citywide Traffic Signal System Upgrade
10. Citywide Traffic Signal Coordination Enhancements
11. RAMP Improvements
12. SAGS Planning
13. SAGS Infrastructure
14. Traffic Signal Adaptive*
15. ADA Improvement Program*
16. Traffic Calming Program*
17. Sidewalk CIP Program*
18. Bike Path Program*



Pleasanton Impact Fee Update

Fehr & Peers partnered with Economic & Planning Systems (EPS) to update the transportation impact fee program for the City of Pleasanton that funds important transportation infrastructure throughout the city. We conducted the Nexus analysis that served as the foundation for establishing the initial program. In this most recent program update, we conducted a Nexus analysis to support the addition of new transportation projects to the program.

Client Name: City of Pleasanton
Location: Pleasanton, CA
Value: \$50,000

San Rafael Transportation Fee Report

Fehr & Peers prepared and updated the city’s Transportation Mitigation Fee (TMF) in conjunction with the San Rafael General Plan Update, both of which were adopted in 2021. The TMF had previously been updated in 2004. Fehr & Peers is currently undertaking a major revision of the TMF to transition the fee from a per-trip basis to a land-use-based fee and to address the requirements of AB 602, AB 2553, and AB 3177.

Client Name: City of San Rafael
Location: San Rafael, CA
Value: \$74,000

2024 CLIENT SURVEY RESULTS

After every project, we check in with our clients—and we truly value their feedback:

- ✓ 98% value
- ✓ 98% quality
- ✓ 98% service
- ✓ 99% say they would use us again

San Ramon Transportation Impact Fee

Fehr & Peers updated the San Ramon Traffic Impact Fee (SRTIF) to reflect current conditions and General Plan assumptions, incorporate new capital projects from the Bicycle Master Plan and ITS Master Plan, and make use of available sources of data while maintaining the general structure of the current TIF to the extent possible.

Client Name: City of San Ramon

Location: San Ramon, CA

Value: \$56,000

References

DALE DENNIS

Program Manager | East Contra Costa Regional Fee & Financing Authority
Dodennis@theycyberjungle.com | (925) 595-4587

Associated Project(s): ECCRFFA Strategic Plan & Comprehensive Fee Update.

MATT KELLY

Acting Director of Planning | Contra Costa Transportation Authority
mkelly@ccta.net | (925) 256-4730

Associated Project(s): CCTA East County Integrated Transit, CCTA Countywide Transportation Plan, SB 743 and VMT Mitigation Framework.

LAETITIA GALEAZZI

Senior Civil Engineer | City of Pleasant Hill
lgaleazzi@phillca.gov | (925) 671-5252

Associated Project(s): Pleasant Hill Transportation Impact Fee & CIP Update.

Insurance Certification

A copy of our sample certificate of insurance has been included in **Appendix B**. We respectfully request the following contract modifications, as suggested by our legal department:

1. PROFESSIONAL LIABILITY (ERRORS AND OMISSIONS). SECTION 11.D.

Changes Requested: At all times during the performance of the work under this Agreement the Consultant shall maintain professional liability or Errors and Omissions insurance appropriate to its profession, in a form and with insurance companies **reasonably** acceptable to the City and in an amount indicated herein. This insurance shall be **endorsed to include contractual liability applicable to this Agreement and shall be** written on a policy form coverage specifically designed to protect against **negligent** acts, errors or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include **the type of** work performed under this Agreement.

Reason for Changes: We cannot offer blanket contractual liability coverage under our Professional Liability Insurance policy because we do not have such coverage. Our PL policy will only cover contractual liability to the extent that the insured professional would have been liable for damages in the absence of contractual language. In other words, the policy only covers the insured professional's negligence. Professional liability coverage is designed to pay on behalf of an insured firm that does not meet the standard of care (i.e., is negligent) in fulfilling its professional obligations; it is not designed to stand behind ALL contractual obligations, unlike the broad form CGL policy which does provide contractual liability coverage.

2. MINIMUM POLICY LIMITS REQUIRED. SECTION 11.E.(II)

Changes Requested: **Except for Professional Liability, Defense costs** shall be payable in addition to the limits.

Reason for Changes: Our professional liability insurance is a "depleting" or "wasting" policy, as are virtually all professional liability policies,

which means defense costs are payable within the limits and not in addition to the limits.

3. INDEMNIFICATION. SECTION 12.I

Changes Requested: Consultant shall indemnify and hold the City, the City Council, members of the City Council, its employees free and harmless from any and all claims, demands, causes of action, suits, actions, proceedings, costs, expenses, liability, judgments, awards, decrees, settlements, loss, damage or injury of any kind, in law or equity, to property or persons, including wrongful death, (collectively, "Claims") ~~in any manner arising out of, pertaining to, or incident to any alleged to the extent caused by~~ negligent acts, errors, or omissions, or willful misconduct of Consultant, its officials, officers, employees, subcontractors, consultants or agents in connection with the performance of the Consultant's Services or this Agreement, including without limitation the payment of reasonable attorneys' fees and other related costs and expenses. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to Claims ~~that to the extent they~~ arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the City, the City Council, members of the City Council, its employees, or authorized volunteers. In no event shall the cost to defend charged to Consultant exceed Consultant's proportionate percentage of fault.

Reason for Changes: These changes are made in order to more closely align with typical indemnification practice for professional services and professional liability insurance.

4. INDEMNIFICATION. SECTION 12.II

Changes Requested: As regards claims, suits, actions or other proceedings described in Section 12.i, Consultant shall pay and satisfy any judgment, award or decree that may be rendered against the City, the City Council, members of the City Council, its employees as part of any such claim, suit, action or other proceeding. Consultant shall also reimburse City for the cost of any settlement paid by the City, the City Council, members of the City Council, its employees, as part of any such claim, suit, action or other proceeding. Such reimbursement shall include payment for the City's reasonable attorney's fees and costs. Consultant shall reimburse the City, the City Council, members of the City Council, its employees, for any and all legal expenses and costs incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the City, the City Council, members of the City Council, its employees, or authorized volunteers. While Consultant shall have no duty to defend the City in litigation or any legal proceedings, Consultant shall be required to reimburse the City for reasonable legal fees and costs the City incurs if the City is obligated to pay damages because of the negligence of Consultant.

Reason for Changes: These changes clarify how this section is aligned with Section 12.i of this Agreement.

Cost Proposal

Our detailed fee for the proposed scope of work can be found in **Appendix C**.

Appendix A. Staff Resumes



Julie Morgan, AICP

Principal & Director of Operations | Principal-in-Charge

About

Julie has 25 years of experience in a wide range of transportation planning efforts, including travel demand forecasting, long-range plan development, and integrated transportation/land use planning. She develops and applies travel demand forecasting tools in all the major travel demand software packages and manages projects ranging from long-range city-wide circulation plans to traffic impact evaluations to applications of innovative analytical methods for quantifying the effects of neighborhood-scale land use changes on personal travel behavior.

Julie has substantial experience with all the major travel models used in the Bay Area and the Central Valley. She has provided travel demand forecasting services in support of numerous planning and engineering projects, including General Plans, infrastructure development studies, and complex environmental impact reviews. Julie has developed substantial expertise in the field of transportation impact fees, having completed nexus studies in support of legally defensible fee programs for dozens of California cities and counties with populations ranging from 25,000 to 400,000, as well as for several regional financing authorities that involve multiple local jurisdictions.

Relevant Project Experience

West Contra Costa Transportation Impact Fee (Contra Costa County, CA)

Fehr & Peers served as the prime consultants for the West Contra Costa Transportation Advisory Committee (WCCTAC) in preparing a comprehensive nexus study to update the West County impact fee program. The fee program is a key mechanism to ensure that future development pays its fair share toward necessary transportation improvements. The West County fee had not been substantially updated since 2005, and the fee levels had not kept pace with inflation. Julie led a comprehensive nexus study, involving extensive engagement with the six local agencies, determination of the fair-share nexus relationships, and discussion of policy and implementation options through many presentations to the WCCTAC Board and the Technical Advisory Committee. Key questions were about financial feasibility, the effects on housing affordability, and the methods for ensuring equitable distribution of fee revenues amongst the member jurisdictions. The final fee was successfully adopted by all the West County jurisdictions.

East Contra Costa Regional Impact Fee (Contra Costa County, CA)

The East Contra Costa Regional Fee & Finance Authority is a regional joint powers agency, involving four incorporated cities and the County, that establishes transportation impact fees and uses the revenue to construct major regional infrastructure projects in eastern Contra Costa County. The Authority has been very successful in delivering projects, having collected more than \$200 million over the life of the fee program and used those funds to construct major highway and arterial infrastructure projects that have benefited all the East County communities.

Fehr & Peers has worked with the Authority since 2000. We have conducted three major updates to the fee program and have collaborated extensively with staff from all of the member jurisdictions on issues related to fee application and

Education

M.S., Transportation Engineering, University of California at Berkeley, 1996

M.C.P., City & Regional Planning (transportation planning emphasis), University of California at Berkeley, 1996

Registrations

American Institute of Certified Planners (015698)

Affiliations

Institute of Transportation Engineers (ITE): Associate

American Planning Association (APA): Member

Women's Transportation Seminar (WTS): Member

Presentations

Advanced CEQA Training on VMT Implementation, California Association of Environmental Professionals, 2019

Evaluating the Effectiveness of TDM Strategies for SB743 Application, Bay Area Regional Modeling Working Group, 2019

Estimating a Disrupted Future: Measuring Emerging Trends in Transportation, 3 Revolutions Conference, Davis, 2018

Transportation Impact Fees in a Multimodal Age, Growth & Infrastructure Consortium National Conference, Portland, 2015

administrative processes. We are currently working with the Authority and member jurisdiction staff to develop a prioritization structure to set guidelines for using the fee revenues to deliver the next set of priority projects within each of the jurisdictions.

Solano County TIF Nexus Study (Solano County, CA)

Fehr & Peers was a key member of the consulting team charged with developing the first regional transportation impact fee program in Solano County. A successful regional fee program requires cooperation among many local stakeholders, and developing such a program requires thorough technical analysis, compliance with legal mandates, and sensitivity to important local political and economic issues. Fehr & Peers and the rest of the consultant team developed a comprehensive approach to engaging the key stakeholders in a collaborative and informed decision-making process. Fehr & Peers staff were responsible for all the technical analysis required to establish the necessary nexus relationships between the capital improvements to be funded and the amount of the fee. This effort required extensive use of the Solano-Napa regional travel demand model, combined with the local knowledge and transportation planning expertise of several Fehr & Peers staff.

City of Brisbane TIF Nexus Study

Fehr & Peers conducted a Transportation Impact Fee (TIF) Nexus Study for the City of Brisbane to calculate fees that the City could collect to fund capital improvements necessary to support new development within the City. The project team coordinated with the city to outline key assumptions, including a methodology based on three separate districts/zones that represent key areas of development within the city. Fehr & Peers used a “select link” analysis to identify the proportional contribution to the necessary improvements by land use and calculate a maximum fee rate for each land use type and district.

Additional Impact Fee Experience

- Oakland Impact Fee Nexus Study (Oakland, CA)
- East Dublin Transportation Impact Fee (Dublin, CA)
- Pleasanton Impact Fee (Pleasanton, CA)
- Pittsburg Fee & Range Road Analysis (Pittsburg, CA)
- Antioch Transportation Impact Fee (Antioch, CA)
- Contra Costa County AOB Services (Brentwood, CA)
- Leona Quarry Traffic Impact Fee (Oakland, CA)
- Lodi IMFP Update (Lodi, CA)
- Ukiah Valley Impact Fee Program (Ukiah, CA)
- El Cerrito Traffic Impact Fee (El Cerrito, CA)
- Napa Circulation Element Update & TIF (Napa County, CA)
- Stanislaus County RTIF (Stanislaus County, CA)
- Corte Madera Impact Fee Study (Corte Madera, CA)
- Fairfield TDM Development & Fee Study (Fairfield, CA)
- Moraga Impact Fee Program Advisory Services (Moraga, CA)
- Santa Cruz County TIF Study (Santa Cruz, CA)



Bruno Lertora

Senior Planner | Project Manager

About

Bruno is a transportation planner with experience in land use planning, traffic operations, and active transportation planning. As a project manager and analyst, he has participated in and managed multiple transportation impact fee nexus studies across the Bay Area for regional authorities and several cities, covering nexus methodology, demand and land-use inputs, planning-level cost updates, external funding credits, and fee schedule recalibration by land use. He is familiar with Mitigation Fee Act requirements and recent case law, and is a clear, bilingual communicator (English/Spanish) who aligns technical analysis with policy direction and stakeholder priorities.

Bruno brings current, on-the-ground familiarity with Lafayette, Moraga, and Orinda from Fehr & Peers' recent work on each city's Housing Element (including RHNA allocations, land-use assumptions, development pipelines, and VMT analysis). He will leverage these accepted datasets to anchor growth inputs to a consistent 2050 horizon, ensuring internal consistency across the three jurisdictions and a transparent bridge between land-use planning and the fee program. Bruno will lead coordination with LFFA and city staff, right-sizing the technical effort, and keeping the study on schedule and within budget.

Relevant Project Experience

STA RTIF Nexus Study Update (Solano County, CA)

Fehr & Peers has assisted the Solano Transportation Authority with the countywide Regional Transportation Impact Fee program for more than ten years. We conducted the nexus analysis that served as the foundation for establishing the initial program, and we have helped STA with several program updates to accommodate changes in regional growth patterns and transportation investment priorities. In this most recent program update, which Bruno is managing, we are conducting a Nexus analysis to support the addition of four new transportation projects to the program.

San Ramon Traffic Impact Fee (San Ramon, CA)

Fehr & Peers helped to update the transportation impact fee program for the City of San Ramon which will achieve the city's objectives of a strong and effective program to fund important transportation infrastructure throughout the city. The focus of our work is to define a program that is legally defensible, effective in generating funds for critical transportation projects, economically feasible within the context of local development constraints, and easy to administer. Fehr & Peers' work efforts include helping to develop a comprehensive list of multimodal transportation improvement projects needed to serve the demands of new development, establishing the magnitude of existing deficiencies in Pleasanton's transportation system, calculating the fair share contributions from new growth, and helping the team to document the findings and conclusions in a legally defensible manner.

Education

B.S., Transportation & Industrial Engineering, Pontifical Catholic University of Chile, 2019

Study Abroad Program, University of California at Berkeley

Software

Python

Synchro

ArcGIS

East Dublin TIF Update for Housing Element (Dublin, CA)

Fehr & Peers is working with the City of Dublin on their East Dublin TIF Update, for which Bruno is serving as the Project Manager. The project team is reviewing model land use inputs and comparing them to the Housing Element data, using that information to update existing processes and documentation as needed.

Lafayette Housing Element Update EIR & VMT Analysis (Lafayette, CA)

Fehr & Peers assisted the City of Lafayette in preparing the housing element and safety evacuation analysis component of the General Plan Update. Bruno led efforts for this project as the Project Manager.

Moraga Advanced Planning Initiative (Moraga, CA)

Fehr & Peers worked with the Town of Moraga and a multi-disciplinary consultant team on the Town's General Plan Housing Element update, Climate Action Plan, and updates to the remaining General Plan elements, as well as the associated EIR. Bruno served as Deputy Project Manager for this effort.

City of Pleasanton Housing Element Update Transportation Impact Analysis (Pleasanton, CA)

Bruno was the Lead Analyst responsible for the transportation impact analysis prepared for the update to the City of Pleasanton's Housing Element Update. As part of the work, Fehr & Peers evaluated the implications to VMT for implementation of the Housing Element Update. Where significant adverse impacts related to various housing sites were identified, mitigation measures were developed and proposed. In addition to the impact of the HEU on VMT the effects of newly generated traffic on intersection levels of service were also assessed. Intersection LOS was evaluated for 50 intersections under multiple scenarios using the local and regional travel demand models.

City of Antioch Housing Element Update & SB 743 Implementation (Antioch, CA)

Bruno served as Project Manager for the City of Antioch's Housing Element Update and SB 743 Implementation project. Fehr & Peers was the transportation consultant who prepared the technical analysis supporting the City's update to the General Plan's Housing Element. As part of this work, the firm prepared an analysis supporting the development of housing plans and programs that will result in beneficial VMT outcomes. In a separate but linked piece of work, Fehr & Peers prepared the analysis and updates to the City's transportation guidelines for the full implementation of SB 743 and the use of VMT to evaluate projects within the city.

Mt. Diablo Boulevard RTOR Restrictions Analysis (Lafayette, CA)

The City of Lafayette's Local Road Safety Plan (LRSP) summarizes community member feedback where many residents share concerns about high-speed corridors, dangerous intersections, and a lack of adequate facilities for pedestrians and bicyclists, especially at the Mt. Diablo Boulevard/Moraga Road intersection. To address some community concerns, Fehr & Peers evaluated the effectiveness of Right Turn on Red (RTOR) restrictions at three intersections along Mt. Diablo Boulevard (Oak Hill Road, Moraga Road, and First Street). The analysis focused on safety elements and multimodal operations under existing and existing with project conditions. Bruno was the Project Manager for this effort.



Mackenzie "Mac" Watten, PTP

Associate | Technical Advisor

About

Mac leads Fehr & Peers' Travel Behavior Forecasting Discipline Group, bringing a measured, analytical, and thoughtful approach to understanding how people move from place to place. His recognized expertise has led to his ITE leadership positions on the ITE Post-COVID Travel Behavior Task Force and the Data Committee, where he is investigating travel behavior data availability, quality, procedures, standards, sources, and tools. He has over 15 years of experience contributing his forecasting travel demand forecasting expertise to a wide range of complex transportation projects across the country and around the world. Mac helps clients address tough questions using data, models, and other tools to understand travel behavior and inform planning efforts. He is always thinking about what comes next, helping clients and colleagues alike address and plan for uncertainty.

Mac has worked extensively across the state of California, developing and applying trip and activity-based models at regional and local scales for a wide range of projects, including transit infrastructure planning, smart growth planning, land use modeling, environmental impact assessments, and highway planning. His history of successfully guiding teams through tough projects has resulted in a deep level of trust from clients, who, along with his colleagues, appreciate his candor, thoughtful insight, and affable demeanor.

Relevant Project Experience

Solano County RTIF Nexus Study Update (Solano County, CA)

Fehr & Peers has assisted the Solano Transportation Authority with the countywide Regional Transportation Impact Fee program for more than ten years. We conducted the nexus analysis that served as the foundation for establishing the initial program, and we have helped STA with several program updates to accommodate changes in regional growth patterns and transportation investment priorities. In this most recent program update, we conducted a Nexus analysis to support the addition of four new transportation projects to the program and applied the recently updated Solano-Napa Activity-Based Model to establish new countywide growth projections. Mac served as the Technical Lead for this effort.

San Ramon TIF Nexus Study (San Ramon, CA)

Fehr & Peers updated the San Ramon Traffic Impact Fee to reflect current conditions and General Plan assumptions, incorporate new capital projects from the Bicycle Master Plan and ITS Master Plan, and make use of available sources of data while maintaining the general structure of the current TIF to the extent possible. Mac provided technical leadership for this project.

East Dublin TIF Update for Housing Element (Dublin, CA)

Fehr & Peers is working with the City of Dublin on their East Dublin TIF Update, for which Mackenzie is providing technical oversight. The project team is reviewing model land use inputs and comparing them to the Housing Element data, using that information to update existing processes and documentation as needed.

Education

B.S. Civil Engineering,
University of California at
Berkeley, 2009

Registrations

Professional Transportation
Planner (793)

Affiliations

Institute of Transportation
Engineers (ITE): Member

Presentations

*Transforming Predictive Models
into Decision Frameworks:
Evidence from San Francisco
Bay Area Rail Transit Models*
(co-authored), Transportation
Research Record, 2020.

Benicia Housing Element Update (Benicia, CA)

Fehr & Peers assisted the City of Benicia in developing VMT analysis methodology, metrics, and thresholds of significance for purposes of CEQA impact evaluation. Mac provided technical leadership for this effort.

Lafayette Housing Element Update EIR (Lafayette, CA)

With Mac as a Technical Lead, Fehr & Peers assisted the City of Lafayette in preparing the Housing Element and safety evacuation analysis component of the General Plan Update. The housing element focuses on how the city needs to address and plan for the housing needs of the community, including lower-income households and people with special needs, such as homeless persons, seniors, and people with disabilities. The safety analysis will focus on the analysis required by Senate Bill 99 and Assembly Bill 747.

Napa County Housing & Safety Element Updates (Napa County, CA)

Fehr & Peers supported Napa County as they updated their Housing and Safety Elements to comply with SB 99 and AB 747 as part of the Multi-Agency Local Hazard Mitigation Plan update, which covers both the unincorporated areas of Napa County, as well as the incorporated municipalities of American Canyon, Calistoga, Saint Helena, and Yountville. Mac supported modeling of different evacuation scenarios, leveraging SNABM and big data.

Caltrain Business Plan (Bay Area, CA)

The Caltrain Business Plan is the blueprint growth plan for Caltrain through the year 2040. This work includes market analysis, service planning, ridership forecasting, and benefit-cost modeling. Mackenzie oversaw the development of the demand forecasting system that combined the regional C/CAG-VTA travel demand model with a direct ridership model first developed as part of Caltrain's Electrification studies. This system was designed to provide data that could then be used in the service planning and benefit-cost modeling aspects of the project.

Vision California (Statewide, CA)

Vision California developed tools that illustrate and measure the role of land use, High-Speed Rail, and SB 375-mandated regional "Sustainable Communities" in meeting AB 32 GHG targets. Mackenzie oversaw the development of a demand forecasting system through which scenarios were evaluated and compared concerning their effects on transportation infrastructure and the environment using the modeling tools developed for the EPA Mixed Use Trip Generation project. Mackenzie leveraged his knowledge and experience with models across California to create an integrated system with consistent metrics statewide.



Valerie Tan

Senior Planner | Project Analyst

About

Valerie is a senior transportation planner with over four years of experience in transportation and land use planning, traffic impact evaluation, and transportation infrastructure projects throughout the Bay Area. Her expertise includes multimodal traffic operations, travel-demand forecasting, and data-driven planning. Valerie has applied traffic operations and travel demand forecasting tools on numerous general plans, land use development studies, and infrastructure development projects to analyze travel behavior and help clients address complex transportation questions. She connects forecasts from travel demand models with detailed traffic operations analysis to inform transportation infrastructure improvements.

Valerie served as the lead technical analyst for the Housing Elements in Lafayette, Moraga, and Orinda, developing and reconciling RHNA allocations, land use capacity, pipeline assumptions, VMT analyses, and supporting evacuation/safety reviews. Valerie will help align the three agencies' Housing Element assumptions to a common 2050 horizon, translating them into fee service units, and documenting clear linkages between land use, project needs, and the fee schedule.

Relevant Project Experience

Lafayette Housing Element Update EIR (Lafayette, CA)

Fehr & Peers prepared the transportation impact analysis for the City of Lafayette's Housing Element update. The analysis included a VMT impact assessment in accordance with the CEQA Guidelines update to address the requirements of SB 743. Valerie worked on SB 99 and AB 747 safety evacuation analysis and VMT impact assessments. The safety evacuation analysis involved identifying areas in Lafayette with only one access road, through GIS, and estimating evacuation times for various scenarios. The VMT impact assessment involved adjusting land use and estimating VMT impacts using the Contra Costa Transportation Authority (CCTA) travel demand model.

Napa Housing & Safety Element Updates (Napa, CA)

Fehr & Peers provided an assessment of roadway capacity under specific evaluation scenarios defined by Napa County. The goal of this project is to provide the county with an approach to comply with SB 99 and AB 747 as part of the Multi-Agency Local Hazard Mitigation Plan update, which covers both the unincorporated areas of Napa County, as well as the incorporated municipalities of American Canyon, Calistoga, Saint Helena, and Yountville. Project work includes evacuation route identification, SB 99 and AB 747 assessments, scenario recommendations, and the identification of policies and implementation programs that will support the overarching goals of the project. Valerie assisted in this effort as a Project Analyst.

Cupertino Housing Element Update EIR (Cupertino, CA)

Valerie was a Task Lead on the transportation impact analysis for the City of Cupertino's Housing Element update. The analysis included a VMT impact assessment in accordance with the CEQA Guidelines update to address the requirements of SB 743. Valerie led the VMT impact assessments and citywide VMT mitigation plan using transportation demand management strategies. The

Education

B.A., Urban Studies, University of California at Berkeley, 2020

B.A., Data Science, University of California at Berkeley, 2020

Software

Synchro/SimTraffic, Vistro, Vissim, Sidra

TransCAD, Cube

Python, Java, SQL

Adobe Creative Suite, ArcGIS

VMT impact assessment involved updating land use across the city and estimating VMT impacts using the Santa Clara Transportation Authority (VTA) travel demand model. The VMT mitigation plan used transportation demand management strategies from the California Air Pollution Control Officers Association (CAPCOA) research and was scaled to a city level.

Pleasanton Housing Element (Pleasanton, CA)

Fehr & Peers performed transportation engineering services for the City of Pleasanton Housing Element Environmental Impact Report (EIR). Our analysis considered the transportation impacts on the City of Pleasanton roadway system with the rezoning of non-residential sites to permit additional housing development. As vehicle delay-based metrics can no longer be used in CEQA documents to identify environmental impacts, Fehr & Peers evaluated vehicle level of service as a non-EIR task presented in a community-concerns document. FP developed VMT maps of the city to aid in the selection of housing sites that have the potential to generate less VMT on a per-capita basis, and thus, would have a greater potential for a less-than-significant transportation impact. Valerie provided Project Analyst support for this effort.

Interregional Bicycle Tourism Study (Central Valley, CA)

Fehr & Peers was hired to develop an interregional bicycle tourism plan, to promote opportunities for safe multimodal traffic, and encourage bicycle tourism as a tool for economic development in rural communities and small cities. The Bicycle Tourism Plan was developed in close partnership with Caltrans District 10 and the California Bicycle Coalition for five metropolitan planning organizations: the Tuolumne County Transportation Council (TCTC), Calaveras Council of Governments (CCOG), San Joaquin Council of Governments (SJCOG), Stanislaus Council of Governments (StanCOG), and Alpine County Local Transportation Commission (ACLTC).

The Bicycle Tourism Plan identified and analyzed priority routes for enhancing bicycle tourism along rural and scenic state highways and local roads, with an eye to improving travel conditions for all modes. A list of recommendations for priority improvements was developed based on a planning process that included community outreach to diverse area residents, including business and property owners, travel bureaus, local policy makers, bike shops and bicycle clubs, and other stakeholders. The project team also identified strategies for promoting the region's bicycle tourism opportunities and encouraging associated economic development for tourism. As part of this project, Valerie contributed to the design of section cuts of proposed improvements, with a focus on including elements that highlight the local context.

Appendix B. Sample COI

Appendix C. Fee & Schedule

Lamorinda Development Mitigation Fee Nexus Study Update

Tasks	Billing Rate	Fehr & Peers (Prime)					Labor Hours	Direct Labor Costs	Reimbursable Expenses	Total
		Julie Morgan Principal-in- Charge	Bruno Lertora Project Manager	Mackenzie Watten Technical Advisor	Valerie Tan Project Analyst	Design Engineer				
		\$400	\$220	\$310	\$220	\$300	\$165			
Task 1 – Review Existing Program & Resolve Policy Issues		12	20	4	32		9	77	\$18,965	\$18,965
Task 2 – Identify Existing Development, Future Growth & Transportation Network Demand		8	16	8	32		8	72	\$17,560	\$17,560
Task 3 – Fee Calculation Methodology		8	24	6	32		9	79	\$18,865	\$18,865
Task 4 – Transportation Needs & Improvement Planning		12	32		60	24	16	144	\$34,880	\$34,880
Task 5 – Funding Considerations		6	12		32		6	56	\$13,070	\$13,070
Task 6 – Jurisdictional Fee Allocation & Prepare Report		20	48	8	88		21	185	\$43,865	\$1,000 \$44,865
Total for Tasks 1–6		66	152	26	276	24	69	613	\$147,205	\$1,000 \$148,205
Contingency for potential scope amendments: 15%										\$22,231
Overall Total										\$170,436

Notes:

Actual billing rate at the time of service may vary depending on the final staffing plan at the time the project starts; the overall fee will not be exceeded.

Reimbursable Expenses will cover travel expenses, production of presentation materials, and other direct costs.

Mileage is billed at the IRS rate plus 10% handling fee.

Rates and staff are subject to change at any time, without notice, and within the total budget shown.

Schedule for the Lamorinda Development Mitigation Fee Nexus Study Update

Project Start Date: 10/27/2025

25 26 27
Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan

Tasks	Start	End	Days	Type	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Task 1 - Review Existing Program & Resolve Policy Issues																			
Project Kickoff Meeting	3-Nov-25	3-Nov-25	1	Meeting	█														
Revised Scope & Schedule (if needed)	3-Nov-25	17-Nov-25	11	Client Review	█	█													
Consolidated Information Request	3-Nov-25	17-Nov-25	11	Client Review	█	█													
Existing Document Review	3-Nov-25	15-Dec-25	31	Work Period	█	█													
Policy Issues Summary	1-Dec-25	15-Dec-25	11	Deliverable		█													
Client Review of Policy Issues	15-Dec-25	4-Jan-26	15	Deliverable			█												
Policy Issues Meeting	4-Jan-26	14-Jan-26	8	Meeting			█												
Task 2 - Identify Existing Development, Future Growth & Transportation Network Demand																			
Growth Projection Estimates Compilation	1-Dec-25	30-Jan-26	45	Work Period		█	█												
Assessment of Methods to Link Land Use to Transportation Demand	1-Dec-25	30-Jan-26	45	Work Period		█	█												
Coordination Meeting to Review Growth Projection Estimates	1-Feb-26	1-Feb-26	0	Meeting				█											
Revision of Land Use Projections (if needed)	1-Feb-26	15-Feb-26	10	Work Period				█											
Growth Projections Summary Table & Agreed Approach for Transportation Demand	1-Feb-26	15-Feb-26	10	Deliverable				█											
Task 3 - Fee Calculation Methodology																			
VMT Methodology Evaluation	15-Feb-26	8-Mar-26	15	Work Period				█	█										
Recalculate DUE Conversion Rates	1-Mar-26	15-Mar-26	10	Work Period					█										
Fair Share Methodology	1-Mar-26	15-Mar-26	10	Work Period					█										
Fee Calculation Methodology Summary	15-Mar-26	1-Apr-26	13	Deliverable					█	█									
Task 4 - Transportation Needs & Improvement Planning																			
Evaluation of Project List Structure	1-Apr-26	15-Apr-26	11	Work Period						█									
Coordination Meeting to Define Project List Structure	15-Apr-26	15-Apr-26	1	Meeting						█									
Improvements/Categories List Update	15-Apr-26	14-Jun-26	43	Work Period						█	█	█							
Planning-Level Cost Estimates Update	14-Jun-26	13-Aug-26	44	Work Period								█	█	█					
List of Proposed Improvements/Categories & Cost Estimates	13-Aug-26	27-Aug-26	11	Deliverable										█					
Task 5 - Funding Considerations																			
Compilation of Funding Sources Inventory	14-Jun-26	5-Jul-26	15	Work Period								█	█						
Evaluation of Expected Sources	5-Jul-26	19-Jul-26	10	Work Period									█						
Draft Report Section on Funding Assumptions	19-Jul-26	2-Aug-26	10	Deliverable										█	█				
Task 6 - Jurisdictional Fee Allocation & Prepare Report																			
Jurisdictional Allocation Formulas Review	27-Aug-26	8-Oct-26	31	Work Period										█	█	█			
Generation of Fee Schedule	27-Aug-26	8-Oct-26	31	Work Period										█	█	█			
Coordination Meeting to Review Fee Schedule	12-Oct-26	12-Oct-26	1	Meeting												█			
Administrative Draft Report	12-Oct-26	1-Nov-26	15	Deliverable												█	█		
Public Draft Report	1-Nov-26	21-Nov-26	15	Deliverable													█	█	
Final Report	21-Nov-26	21-Dec-26	21	Deliverable														█	█
Presentation at LFFA Public Hearing for Report Adoption	10-Jan-27	20-Jan-27	8	Meeting															█

Notes:

Task Type	Legend
Meeting	█
Work Period	█
Client Review	█
Deliverable	█

ATTACHMENT 2

LFFA Nexus Study Update

Request for Proposals

Lamorinda Fee and Finance Authority (LFFA)



REQUESTS FOR PROPOSALS FOR LAMORINDA DEVELOPMENT MITIGATION FEE NEXUS STUDY UPDATE

City of Lafayette

Engineering Services Department

3675 Mt. Diablo Blvd; Suite 210

Lafayette, CA 94549

(925) 284-1951

PROPOSALS DUE: FRIDAY, SEPTEMBER 19, 2025 BY 4:00 P.M.

Introduction

The City of Lafayette, on behalf of the Lamorinda Fee and Finance Authority (LFFA), is soliciting proposals from qualified consultants to prepare an update to the Lamorinda Development Mitigation Fee Program Nexus Study, last updated in 2015. The LFFA is a joint powers authority composed of the cities of Lafayette, Moraga, and Orinda. Its purpose is to equitably collect and allocate transportation impact fees to fund roadway, transit, bicycle and pedestrian projects necessary to mitigate the impacts of and accommodate travel demand generated by new land development within the three jurisdictions.

The Nexus Study provides the legal and technical foundation for the LFFA's transportation impact fee program. It establishes a reasonable relationship between new development in Lamorinda and the need for transportation related improvements that will serve that growth. The existing study identifies the types of infrastructure needed, estimates associated costs, and calculates a schedule of maximum justified fees by land use category. Importantly, the Study provides a fair-share cost analysis to equitably distribute the impact fees between the three Lamorinda jurisdictions.

An update to the Nexus Study is intended to ensure that the LFFA's fee program remains legally defensible, reflects current development forecasts and transportation needs, and continues to provide a proportionate and equitable distribution of transportation mitigation responsibilities. Upon review of the existing program, including consultation with LFFA staff, the impact fee Nexus Study shall be updated to reflect current facility needs, facility costs, and development projections.

Goals of the Study Update

The selected consultant will be responsible for preparing a technically comprehensive and legally sound update to the Nexus Study. This includes ensuring that the document meets the following goals:

- **Legal defensibility:** Ensure full compliance with the Mitigation Fee Act (AB 1600) and applicable legal standards of reasonable relationship and rough proportionality. Consider possible impacts from case law such as U.S. Supreme Court Sheetz v County of El Dorado.
- **Program-Wide Review:** Make broad recommendations on the study's approach, such as whether the updated report should include specific lists of transportation capital projects versus categories of project-types. Additionally, the updated study

should assess the potential for incorporating wildfire mitigation as well as emergency evacuation infrastructure improvement costs into the fee structure.

- **Current data:** Reflect the latest Regional Housing Needs Allocations (RHNA), development forecasts, and traffic data to assess growth-related infrastructure needs.
- **Fee recalibration:** Update the schedule of maximum justified transportation impact fees by land use category, based on revised cost estimates and updated growth assumptions.
- **Planning consistency:** Align analysis with a new planning horizon year (proposed 2050) for development projections and capital improvements.
- **Transparency and documentation:** Provide detailed, accessible explanations of assumptions, calculations, and nexus findings to support policymaking.
- **Ongoing relevance:** Establish a recommended update cycle (e.g., every 10 years) to keep the fee program responsive to legal, policy, and market changes.
- **Fair Share Contribution:** Establish a recommendation for if and when additional fair share contribution fees are appropriate (e.g., impacts to an isolated intersection). Additionally, establish a methodology to calculate the fee.

The update should provide a schedule of maximum justified fees by land use category and include clear, transparent documentation of all assumptions, methodologies, and findings.

SCOPE OF WORK

Below is the proposed work plan for the update to the Lamorinda Development Mitigation Fee Program Nexus Study. Each task is identified along with associated meetings and deliverables.

Task 1: Review Existing Program and Resolve Policy Issues

Objective: Review the 2015 Nexus Study and local policy documents from all three jurisdictions, including General Plans, Housing Elements, transportation plans, and all other applicable documents and reports. Identify and document legal and policy issues that may affect the update. Assess the adequacy of the existing fee framework and modeling tools. Confirm the study's alignment with recent legislation and legal precedent.

Description:

- Review the existing 2015 Nexus Study and relevant fee ordinances/resolutions.
- Review Housing Element updates and other master plans, policies and programs from each of the three Lamorinda jurisdictions related to transportation infrastructure.
- Identify policy-related issues such as LOS vs. VMT, wildfire mitigation project eligibility, fair share methodology, recommended changes to how fees per land use type are calculated, and adequacy of traffic modeling for use in establishing a transportation facilities fee, among other possible questions.
- Address relevant state statutes and case law.

Meetings: Two meetings with staff to initiate the project, discuss data needs, address applicable policy issues and address questions.

Deliverables: Information requests; revised project scope and schedule (as needed), and a brief written summary of the policies and how they may be integrated within the updated Nexus Study.

Task 2: Identify Existing Development, Future Growth and Transportation Network Demand

Objective: Establish baseline development levels and project growth through 2050. Incorporate RHNA data, second unit trends, and institutional uses. Validate “Dwelling Unit Equivalent” (DUE) methodology and update prior Nexus Study tables accordingly. Develop clear methods for linking land use to transportation demand.

Description:

Identify the base year for estimating existing levels of development and for calculating facility standards based on existing facility inventories. Include entitled development that would be exempt from fee program.

- Consult with LFFA staff to develop growth projections to 2050. Consider projections from the CCTA's traffic model and/or other available sources.
- Develop clear methods for linking land use to transportation demand. For example, identify population density factors to convert population estimates to dwelling units. Changes to estimates and projections during subsequent tasks could cause

unanticipated effort and require an amendment to the work plan and budget. Obtain approval of estimates and projections from LFFA staff prior to proceeding.

- Identify base year conditions and estimate existing development.
- Incorporate RHNA allocations and new assumptions about second units and institutional uses for all three jurisdictions.
- Revisit all DUE-related tables from the existing Nexus Study (Tables 2, 5, 6, and 8) to reflect current conditions and expected growth.
- Assess how streamlined, ministerial housing approvals (e.g., SB 35, AB 2011) may limit fee collection and affect Nexus Study findings.

Meetings: One meeting with LFFA staff to discuss growth projection estimates and any proposed changes to methodology in how transportation network demand is estimated.

Deliverables: Table of existing and projected development by land use and jurisdiction. Agreed approach for converting land use data to measure facility demand.

Task 3: Fee Calculation Methodology

Objective: Reassess methodology for calculating impact fees. Evaluate VMT, project trips, and LOS options, recalculate cost per DUE, and recommend a consistent approach to fair-share contributions. Provide updated assumptions and potential streamlining or revision of outdated tables.

Description:

Evaluate and update the use of Vehicle Miles Traveled (VMT) vs. Project Trips vs. Level of Service (LOS) for impact measurement. Recalculate cost per DUE and determine fair share contribution methodology for project-specific improvements. Specifically:

- Review or develop standards for multi-modal transportation facilities.
- Distinguish between facilities for existing demand vs. new development.
- Evaluate and potentially update the Vehicle Miles Traveled (VMT) methodology. Identify if other measures are appropriate to consider as well.
- Recalculate Dwelling Unit Equivalent (DUE) rates and cost allocations, considering current traffic and land use conditions.

- Reassess the inclusion or revision of tables used to calculate fees (e.g., consider retiring Cost per Dwelling Unit Equivalent table if redundant).
- Identify a methodology for when to conduct a “fair share” contribution assessment for planned and/or project triggered improvements. Provide a recommendation if this should be done at the local and/or regional level.
- Evaluate the possible effect of current and potential exemptions for transit-oriented development (TOD), including impacts to fee revenue and equity across land use types.
- Consider legal limitations and explore whether project-specific conditions of approval could be used to supplement impact fee-funded mitigations, within statutory and case law constraints.

Meetings: None.

Deliverables: Brief written summary of the recommended fee calculation methodology for confirmation from LFFA staff.

Task 4: Transportation Needs and Improvement Planning

Objective: Identify infrastructure required to support growth and determine whether to retain a fixed project list or define broader categories. Update or develop cost estimates and explore durable methods for valuing improvements. Incorporate multimodal priorities and new data tools (e.g., Streetlight).

Description:

Recommend whether or not a specific list of transportation facilities should be identified to accommodate growth. Identify the type, amount and cost of facilities that may be required to accommodate growth.

- Review or develop standards for multi-modal transportation facilities.
- Distinguish between facilities for existing demand vs. new development.
- Consider whether to maintain a fixed project list (e.g., Appendix A from current study) or shift to a more flexible list of eligible project categories.
- Revisit “planning-level” cost estimates with updated figures where relevant and if deemed appropriate.

- Address concerns that static cost estimates become quickly outdated by identifying more durable methods for project valuation.
- Explore use of data platforms like Streetlight for cost-effective traffic counts and travel behavior analysis.
- Ensure project categories (Section 4.4) reflect contemporary multi-modal values, needs and goals.

Meetings: One coordination meeting with LFFA staff.

Deliverables: List of proposed improvements (or categories) and associated cost estimates.

Task 5: Improvement Cost Estimates

Objective: Identify non-fee sources of funding for infrastructure needs.

Description:

Impact fees will only partially fund the proposed transportation improvements. The Mitigation Fee Act requires a report on the anticipated source and timing of the additional funding. There are two types of alternative funding sources:

- Funding from non-impact fee sources to correct existing deficiencies; and
- Funding from new development other than impact fees that may be credited against new development's impact fee contributions, possibly including taxes paid to finance facilities.

Consultant shall identify anticipated alternative funding based on information from LFFA staff or note that funds are still to be identified based on a list of probable funding alternatives.

It is assumed that facilities are to be funded predominantly on a pay-as-you-go basis. Scope does not include a cash flow analysis to analyze the effect of timing of fee revenues on financing costs.

- Consider other potential sources of funding (e.g., grants, taxes).
- Identify expected sources for addressing existing deficiencies.

Meetings: None

Deliverables: Section in draft report identifying funding assumptions.

Task 6: Jurisdictional Fee Allocation Methodology and Prepare Report

Objective: Update jurisdictional allocation formulas, incorporate current LFFA accounting practices, and ensure fee assignments reflect demand. Prepare all draft and final report versions. Assist in presenting findings and final recommendations.

Description:

Generate a fee schedule to apportion facility costs by impact on each City/Town. Prepare draft report tables for LFFA staff to review that document each step of the analysis, including schedule of maximum justified fees for each facility type included in the study. The fee schedule should differentiate between local (each City/Town impact fees) and regional (Lamorinda) impact fees.

Following one round of comments from each jurisdiction's staff on the quantitative analysis and fee schedules, prepare an administrative draft report. Following one round of comments on the administrative draft, prepare a public draft for presentation to interested parties, the public and elected officials. Prepare a final report if necessary, based on one round of comments received on the public draft report. Provide one electronic copy of all drafts and final report.

Provide legal counsel with copies of fee resolutions and ordinances used by other jurisdictions, if requested.

- Reevaluate the two-step revenue allocation process based on recent LFFA financial practice changes (e.g., per-agency net tracking from FY 2023–24).
- Identify and evaluate existing local development fees collected by each jurisdiction and provide recommendations to improve coordination, minimize duplication, and enhance transparency.
- Consider changes to how local and regional shares are calculated, potentially revising the formulas in the current Appendix C.
- Ensure fee allocations reflect actual usage and growth-related travel demand, not just jurisdictional boundaries.
- Calculate maximum justified fees by land use and jurisdiction.
- Draft fee tables, technical appendix, and Nexus findings.
- Revise drafts based on staff, public, and legal review.
- Assist with presentations at staff, public, and governing board meetings.

Meetings: Two meetings: One meeting to discuss results with staff; and one meeting to present the report at an LFFA Public Hearing for adoption.

Additional meetings may be needed to present the report at individual or joint meetings of all Lamorinda councils.

Deliverables: Fee schedules, full report drafts, final report, and presentation materials.

PROPOSAL REQUIREMENTS

Firms responding to this RFP must include the following in their proposal:

1. **Cover Letter** – Describe the firm's interest in the project and commitment of personnel to the project. Include a written statement that the contract form, conflicts of interest provisions, timeline, and insurance are understood. The individual authorized to negotiate the final contract must sign the letter.
2. **Project Understanding and Approach** – Demonstrate an understanding of the Nexus Study update goals and describe the proposed methodology. Include a comprehensive scope of work to be performed. Provide sufficient information about the work plan to staff the project. Describe your study approach and how any subconsultant fits in the overall team.
3. **Work Plan and Schedule** – Timeline with key tasks, deliverables, and meetings.
4. **Team Qualifications** – Describe the experience of the firm and any subconsultant(s) with a description of similar type projects. Describe the project team structure showing key project personnel, firm affiliation, position title, and identify reporting relationships. Include resumes (2-page limit each).
5. **Related Experience** – Provide examples of at least two similar projects.
6. **References** – Contact information for recent clients.
7. **Insurance Certification** – Verification of compliance with insurance requirements.
8. **Cost Proposal** – Provide a cost proposal for all work and rate schedule described in the proposal. Include labor rates, total cost, and any optional/add-on tasks.

Submittal Instructions:

Submit an electronic copy of your firm’s proposal in PDF format to:

Patrick Golier, Transportation Program Manager
City of Lafayette
Email: pgolier@ci.lafayette.ca.us

Proposals must be received no later than 4:00 P.M. on Friday, September 19, 2025. Late proposals will not be considered.

SELECTION PROCESS

Proposals will be evaluated based on the following criteria:

- Understanding of the project scope and legal context
- Methodological soundness and feasibility
- Experience and qualifications of key team members
- Project cost and value
- Responsiveness to RFP and proposal clarity

A Selection Committee may conduct interviews with top-ranked firms. The LFFA reserves the right to reject any or all proposals.

RFP SCHEDULE

Milestone	Date
RFP Release	August 11, 2025
Deadline for Questions	August 29, 2025
Responses to Questions	September 5, 2025
Proposals Due	September 19, 2025
Consultant Interviews (if needed)	October 2, 2025
Consultant Selection / Contract Award (TBD)	October 10, 2025
Project Start (TBD)	October 27, 2025

QUESTIONS

All questions should be addressed to:

Patrick Golier, Transportation Program Manager

City of Lafayette

Email: pgolier@ci.lafayette.ca.us

Questions must be submitted in writing no later than Friday, August 29, 2025. Written responses to the inquiries will be uploaded by Friday, September 5, 2025 to the RFP webpages for each Lamorinda jurisdiction and provided to all consultants who have downloaded the RFP and/or have expressed interest in the project.