

# CITY OF LACEY

## REQUEST FOR QUALIFICATIONS

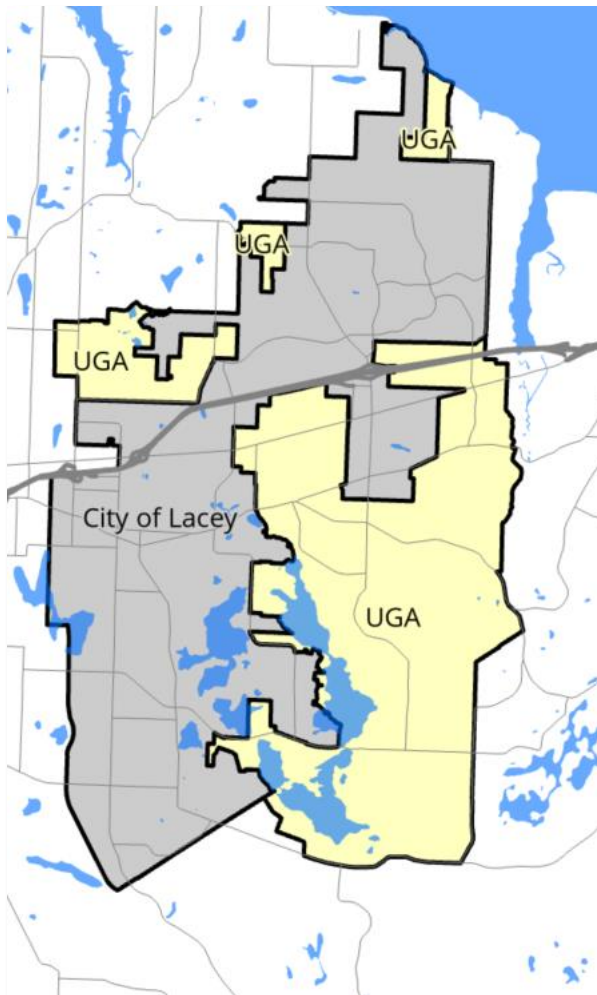
### ANALYSIS OF THE FISCAL IMPACTS OF ANNEXATION

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#### I. SUMMARY

The City of Lacey (City) is seeking planning services to analyze the financial impacts of annexing the unincorporated portions of Lacey's Urban Growth Area (UGA). The City is soliciting a Statement of Qualifications from consultants experienced in the development of studies of the fiscal impact of annexations.

Statements of Qualifications (SOQs) will be evaluated based on the firm's experience and approach to analyzing the fiscal impacts of annexation, knowledge



of annexation methods, and of the Growth Management Act (GMA).

Statements of Qualifications, prepared according to the following detailed instructions, must be received at the email address below no later than **4:30 PM PST, December 18, 2023**.

The City assumes no obligations of any kind for expenses incurred by any respondent to this solicitation.

It is the City's policy to assure nondiscrimination in any contract entered pursuant to this advertisement. Firms will not be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award as provided by Title VI of the Civil Rights Act of 1964.

For additional information, contact:

Grant Beck, Planning & Development Services Manager  
Lacey Community & Economic Development Department  
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Lacey, WA 98503  
Phone: (360) 413-4340  
E-mail: gbeck@ci.lacey.wa.us

## II. GENERAL INFORMATION

The City is organized under the optional municipal code (Chapter 35A.63 RCW) as a Council-Manager plan of government. The City fully plans under the Growth Management Act.

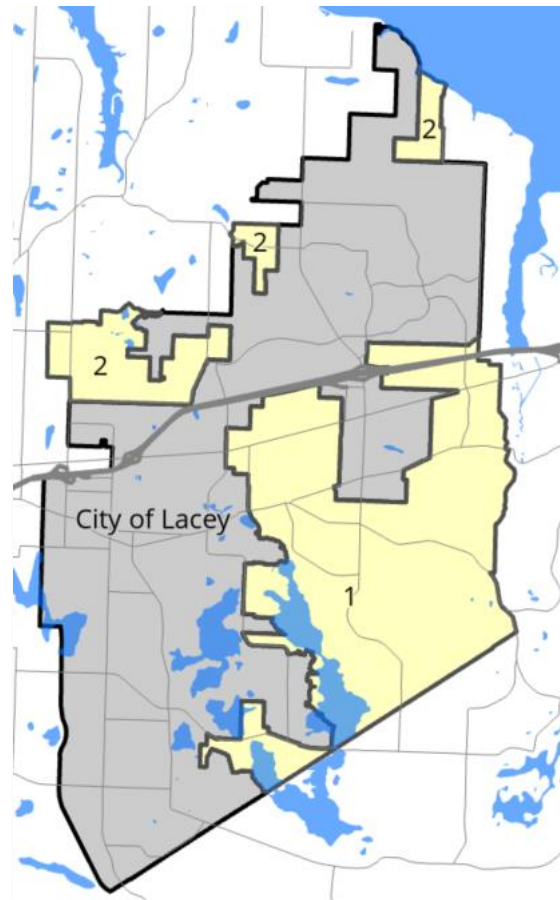
The incorporated portion of Lacey's UGA is 12,166 acres with a 2023 population of 59,430. The unincorporated portion of the UGA includes 9,113 acres with a population of 35,520.

## III. OBJECTIVES OF THE FISCAL ANALYSIS

The fiscal analysis will inform the Lacey City Council and staff of the fiscal impacts of annexing unincorporated areas within the City's UGA into the City.

The analysis will be used to develop an annexation strategy and identify areas of the unincorporated UGA to be annexed.

The final document will consider the City of Lacey Annexation Policies adopted by the Lacey City Council on June 9, 2011, which has served as a framework for how the Lacey City Council evaluates proposed annexations.



The analysis will evaluate the short- and long-term fiscal impacts of annexation to the City, consistent with the Municipal Research Service Center (MRSC) Annexation Handbook, and will:

- Identify and quantify ongoing revenues that could be generated for the City for general government functions from within the identified annexation areas.
- Quantify the cost of providing general government services, by department, at current City service levels and the cost of providing general government services by Department in comparable cities in Washington State.
- Identify and quantify the costs of providing water, sewer, and stormwater utility services at current City service levels and the cost of providing the same utility services in comparable cities in Washington State.
- Identify infrastructure deficiencies within the identified annexation areas and estimate costs to upgrade identified deficiencies to City standards.
- Quantify the fiscal impacts of annexation based on the following metrics.
  - A home on a typical urban lot:
    - served by City water, sewer and stormwater service,
    - served by a public water system (non-City) and City sewer,
    - served by a public water system and on-site septic, and
    - served by an individual well and on-site septic.
  - A home on a typical suburban lot:
    - served by City water and sewer service,
    - served by a public water system and City sewer,
    - served by a public water system and on-site septic, and
    - served by an individual well and on-site septic.
- Quantify within the identified annexation areas the effect of Section 82.14.415 Revised Code of Washington which relates to the use of sales and use tax for cities to offset municipal service costs in newly annexed areas.
- Quantify the amount of bonded indebtedness to be assumed by the identified annexation areas.
- Identify any impacts to the City from annexations based on commitments expressed in interlocal agreements

#### IV. INTENDED SCHEDULE

SOQs due	December 18, 2023
Interviews (if needed)	January 8, 2024
Negotiations with Finalist	January 12, 2024
Final Review of Contract	January 16, 2024
Finalize Contract	January 26, 2024

#### V. STATEMENT OF QUALIFICATIONS CONTENT

The SOQ should be provided in Adobe's Portable Document Format. All submissions shall not be more than ten (10) pages in length, not including the title page and table of contents. Submissions must include the following information:

1. Name and contact information.
2. Curriculum Vitae of the consultant and the project team who would prepare the fiscal analysis.
3. A detailed description of the consultant's approach to preparing a detailed fiscal analysis.
4. A list of data needed for the consultant to complete the fiscal analysis.
5. A description of how the consultant will keep City staff informed and engaged throughout the development of the fiscal analysis.
6. Three (3) professional references with personal knowledge of work and experience that demonstrate the ability to prepare a fiscal analysis.

#### VI. SELECTION PROCESS

Statements will be reviewed and evaluated by considering the quality of experience, strength of the approach, and the responses to the RFQ.

If necessary, consultants may be invited to interview. Based on the SOQs and/or interviews, the selection panel will recommend to the City Manager the firm which, in its opinion, best meets the requirements set forth in this RFQ and negotiate a professional services agreement.

The City reserves the right not to enter into an agreement through this process.

The proposals will be evaluated, generally, in accordance with the criteria itemized in **Table A** below. The panel will review how closely an applicant's proposal meets all the requirements set forth in the RFQ.

<b>TABLE A</b>	
<b>Selection Criteria</b>	
<b>Category</b>	<b>Maximum Points</b>
1. Capability and experience	40
2. Approach to the project and working with staff	35
3. Demonstrated commitment to diversity, equity, and inclusion	25
<b>Total Possible Points</b>	<b>100</b>