



impact fees, capital planning and public finance

## **SPEAKER BIOGRAPHIES**

### **“Impact Fees and Infrastructure Finance: Back to Basics in a Changing World” 23<sup>rd</sup> Annual GIC Conference, October 18-20, 2017**

**Hyatt Regency, 1000 Boulevard of the Arts, Sarasota, FL 34236**

#### **PJ Anderson, Land Development Attorney and El Paso County Road Impact Fee Advisory Committee Chair**

PJ has worked in land development for over 40 years as an attorney, land developer and a planning administrator for cities and counties. His vast experience and knowledge served El Paso County during the creation of the Road Impact Fee program. PJ has served as the Chair of the Fee Advisory Committee since its inception in 2012. On the committee, PJ holds a seat for the development community. PJ holds a BA from Colorado College, an MA from the University of Northern Colorado and a JD from Washburn University. PJ also serves his community by sitting on many local boards and committees.

#### **Robert W. Burchell, Ph.D., Center for Urban Policy Research, Rutgers University, New Brunswick, NJ**

Robert W. Burchell, Distinguished Professor and Co-Director at the Center for Urban Policy Research, Rutgers University, is the author of 30 books and more than 50 articles. He is an expert on fiscal impact analysis, land-use development and regulation, and housing policy. Dr. Burchell has served as principal investigator on more than \$4 million in research spanning a thirty-year career at Rutgers. One of these efforts included the Impact Assessment of the New Jersey State Development and Redevelopment Plan, an encompassing study of the growth management program adopted by the New Jersey State Planning Commission in June 1992, an impact assessment done in 1992 and repeated in 2001 (in both cases a requirement for passage of the State Plan). Similar “costs of sprawl” studies have been done for the state of Maryland, the Lexington (KY) Metropolitan Area, the Delaware Estuary, the Southeast Michigan Council of Governments, and the South Carolina Advisory Commission on Intergovernmental Relations. Dr. Burchell’s seminal work in the area of development patterns and infrastructure costs is a just completed research project for the National Academy of Sciences and the Transportation Cooperative Research Program resulting in *The Costs of Sprawl Revisited* and *The Costs of Sprawl-2000*. Dr. Burchell, also a licensed professional planner in New Jersey, is in demand as an expert witness nationally, and has served as a consultant to The Port Authority of New York and New Jersey, the U.S. Department of Housing and Urban Development, the U.S. Health and

Human Resources Administration, the U.S. Office of Management and Budget, the Nuclear Regulatory Commission, and The Smith Richardson Foundation.

**Carson Bise, AICP, President, TischlerBise, Bethesda, MD**

Carson Bise has over 20 years of professional experience in fiscal, economic and planning activities, and holds BS degrees in Geography and Political Science and an MBA in Economics. Mr. Bise has completed over 125 impact fees in 11 different states for the following infrastructure categories: parks and recreation, open space, police, fire, schools, water, sewer, roads, municipal power and general government facilities. Recognized as an expert, Mr. Bise sits on the Board of Directors for the Growth & Infrastructure Consortium (formerly National Impact Fee Roundtable) and frequently gives lectures and conducts workshops on impact fees, infrastructure finance and fiscal impact analysis for various groups and organizations including the American Planning Association, the National Association of Homebuilders, Growth & Infrastructure Consortium and the Government Finance Officers Association. Mr. Bise has also authored numerous articles on infrastructure finance and fiscal impact analysis. His most recent publication is a chapter on fiscal impact analysis in the book *Planning and Urban Design Guidelines*, 2006, published by the American Planning Association. Mr. Bise was also the principal author of the fiscal impact analysis component for the Atlanta Regional Commission's Smart Growth Toolkit and is featured in the 2005 AICP CD-ROM Training Package entitled, "The Economics of Density."

**Byron Flagg, Robinson+Cole, Miami, FL**

Byron Flagg is a member of the firm's Real Estate and Development Group, handling land use and environmental matters in Florida. Mr. Flagg helps clients navigate through legal issues involving the use of land, water, and natural resources. He focuses on representing businesses, local governments, individuals, and non-profit organizations. Mr. Flagg is an experienced litigator who has represented clients in over 30 jury trials and numerous hearings. His litigation experience includes cases involving property rights disputes, inverse condemnation and takings issues, easement disputes, plats, restrictive covenants, ad-valorem property tax issues, and unusual real property issues. He has also represented private property owners before local government boards. Prior to joining Robinson+Cole, Mr. Flagg was an assistant general counsel for the St. Johns River Water Management District (a state agency that regulates water resources and wetlands impacts across 18 counties), where he represented the district in litigation and regulatory matters. Before that, he worked for several years as a land use and environmental lawyer, representing private property owners in Florida. He is a veteran of the U.S. Coast Guard who was called to active duty following the September 11, 2001 terrorist attacks. He is also a former Assistant State Attorney who represented the state of Florida in felony and misdemeanor criminal prosecutions. He served as State Attorney Representative on the Alachua County Environmental Crimes Task Force, a role that involved regularly advising state, county, and city code enforcement officers. Mr. Flagg has a law degree from the Levin College of Law at the University of Florida.

**David Goldstein, Chief Assistant County Attorney, Pasco County, New Port Richey, FL**

David is Florida Bar Board Certified in City, County and Local Government Law, and has been practicing law for approximately 23 years. His primary areas of expertise include concurrency, impact fees, capital facilities planning and financing, and land use/zoning law. David is the primary author of Pasco County's mobility fee regulations, and has negotiated most of Pasco County's economic development incentive agreements.

**Dwayne Guthrie, PhD, AICP, Impact Fee Manager, Manatee County, Bradenton, FL**

Mr. Guthrie was recently hired as the Impact Fee Manager for Manatee County. He previously worked as an impact fee consultant for TischlerBise.

**Tony Hairston, Senior Manager, Raftelis Financial Consultants, Inc., Casselberry, FL**

Mr. Hairston, a Senior Manager with Raftelis, has 19 years of experience assisting water & wastewater utilities in addressing financial, pricing and management issues. He has managed projects for over 50 municipalities and special districts. He is the founding chair of the Finance & Rates Committee of the Florida section of the American Water Works Association. He is a contributing author of *Water and Wastewater Finance and Pricing*. Mr. Hairston has B.S. and M.S degrees in economics from Florida State University.

**Jeffrey Hays, AICP, Transportation Planner Manager, Alachua County Growth Management Department, Gainesville, FL**

Jeff is a graduate of the University of Florida with a background in environmental science and policy. Mr. Hays has been employed by the USGS, Hernando and Alachua Counties in a variety of environmental, land use and transportation planning roles. He now specializes in the land use/transportation connection and administration of the Alachua County Impact Fee and Mobility Fee Ordinances.

**Darren Henderson, Vice President, Parsons Brinckerhoff, Tempe, AZ**

Darren Henderson serves as a Managed Lanes Practice Director. Darren is recognized internationally for his expertise on Managed Lanes and Congestion Pricing, serving as a Project Manager and/or technical advisor for many clients and presenting at industry events in the United States, China, Australia, New Zealand and Singapore. Darren currently manages the Southern California Region Value Pricing Project Regional Express Lane Network Study, the I-405 HOV to HOT Conversion Feasibility Study, and the Phoenix Area Managed Lanes Network Development Strategy. During his 13 years with PB, Darren has specialized in managed lanes projects with his recent accomplishments including a lead role on the successful opening of the I-10 and I-110 ExpressLanes projects in Los Angeles County. Darren has been a member of the American Institute of Certified Planners (AICP) since 2000, and is currently a member of the Transportation Research Board (TRB) Managed Lanes Committee.

**Gary Hubbard, Director of Utilities, Charlotte County Utilities, Port Charlotte, FL**

Mr. Hubbard joined Charlotte County Utilities in February 2014 as the Utilities Operation Manager. He currently serves as the Utilities Director. He brings 34 years of experience dealing with environmental issues to southwest Florida. During his career, he has served as the owner of a successful consulting engineering firm specializing in municipal utility systems, a co-owner of a utilities operations firm, a co-owner of a firm specializing in the design, build and operations of industrial wastewater treatment systems throughout Central and South America and as the former Assistant Utilities Director for the City of Cayce, South Carolina. He is a registered professional engineer in South Carolina, as well as a licensed class A water and wastewater treatment operator in South Carolina. Mr. Hubbard holds a B.S. degree in Civil Engineering from Clemson University.

**Nilgün Kamp, AICP, Associate Principal, Tindale Oliver, Tampa, FL**

Nilgün is the Director of Public Finance and Infrastructure Planning Group for Tindale Oliver and has more than 20 years of experience in public finance and infrastructure planning projects. Her experience includes impact fee, assessment, and user fee studies, financial projections, and economic impact analysis. In addition, she has managed various infrastructure planning studies, such as those for schools, fire/EMS stations, convention centers, stadiums, arenas, etc. She offers significant experience with annual budgets, capital improvement programs, revenue projections, and funding sources.

**Melissa Lindsjo, Senior Planner, TischlerBise, Bethesda MD**

Melissa Lindsjo has 7 years of progressive experience in planning-related activities with a special emphasis on Sustainability Planning. Ms. Lindsjo has conducted impact fee assignments and has provided analysis on fiscal and economic impact analyses in several states. Before joining TischlerBise, she was a Planner Coordinator for the Maryland-National Capital Park and Planning Commission in Prince George's County, MD. Ms. Lindsjo holds a Bachelor's degree from Wittenberg University in Geography and Master's degrees in City and Regional Planning from the Knowlton School of Architecture as well as Public Policy and Management from the John Glenn School of Public Affairs. She has presented at various conferences and seminars including the National APA Conference. Ms. Lindsjo is currently serving on two Board of Directors: the Growth and Infrastructure Finance Consortium and serving as Secretary to the Kennedy Street Development Corporation, a local non-profit in D.C. focusing on making Kennedy Street NW a vibrant, walkable, and mixed-use corridor with long term public and private investments.

**Dwight Merriam, FAICP, Partner, Robinson + Cole, Hartford, CT**

Dwight Merriam founded Robinson+Cole's Land Use Group in 1978. He represents land owners, developers, governments, and individuals in land use matters. Mr. Merriam is a Fellow and past president of the American Institute of Certified Planners, a former director of the American Planning Association (APA), a former chair of the APA's Planning and Law Division, past chair of the American Bar Association's Section of State and Local Government Law, and a Fellow of the Royal Institution of Chartered Surveyors. He teaches property and land use law at the Quinnipiac University School of Law where he is a Distinguished Practitioner in Residence. He teaches land use law at the University of Connecticut School of Law and at the Quinnipiac School of Law and has published over 200 articles and 13 books.

**Clancy Mullen, Principal, Duncan Associates, Austin, TX**

Clancy has been the primary author of most of the firm's impact fee studies since joining Duncan Associates in 1989. In addition to over 300 studies for cities and counties from coast to coast, he has also prepared studies for the Florida Department of Community Affairs, the Hawaii Department of Education, the Louisiana Department of Transportation, the Maryland-National Capitol Park and Planning Commission, and the Minnesota Department of Agriculture. Prior to joining Duncan Associates, Clancy served as a zoning planner for the City of Austin, Texas. Clancy is a frequent conference speaker on impact fees, and is a founding and current member of the Board of Directors of the Growth & Infrastructure Consortium. He was a National Merit Scholar at Rice University and has a master's degree in community and regional planning from the University of Texas at Austin.

**Jerry Murphy, JD, AICP, CFM, Research and Development Manager, University of Florida Resilient Communities Initiative, Gainesville, FL**

Jerry Murphy is a certified floodplain manager, certified urban and regional planner, and legal scholar. His work and research focuses on land use planning and control law, community-based planning, code and regulation drafting, floodplain management, infrastructure finance and planning, community resiliency and sustainability. He currently leads the University of Florida's Resilient Communities Initiative, reaching out to local governments through interlocal agreements to assemble teams of expert faculty, researchers, and student assistants to craft planning solutions to the challenges facing local governments in the 21st Century.

**Arthur C. Nelson, Ph.D., FAICP, Professor, University of Arizona, Tucson, AZ**

Chris Nelson is Professor of Urban Planning and Real Estate Development, University of Arizona, and Presidential Professor Emeritus, University of Utah. Professor Nelson has conducted pioneering research in public finance, development policy, smart growth, economic development, and metropolitan development patterns. He has written more than 20 books, 100 refereed articles, and 300 other works. Prior to academia, Dr. Nelson managed his own West Coast consultancy in planning and management. In 2000, his professional planning, education, and research accomplishments were recognized with election to the College of Fellows of the American Institute of Certified Planners. Dr. Nelson's current work focuses on how demographic economic forces along with shifts in housing preference will reshape America's metropolitan areas for the rest of this century.

**James C. Nicholas, Professor Emeritus, University of Florida, Gainesville, FL**

Jim was involved in the advent of impact fees in Florida in the 1970s and has been involved ever since. In addition to teaching and writing on the subject, Dr. Nicholas continues to consult to local governments in Florida and elsewhere on impact fee calculation and implementation issues. He is an expert in natural resource and land use management, Florida growth management legislation, urban land economics, urban and regional planning and environmental and urban problems. Jim is Professor Emeritus of Urban & Regional Planning and Affiliate Professor of Law, University of Florida, Gainesville, Florida, 1985 to 2012. He was Associate Director, Environmental and Land Use Law Program, College of Law, 1999 to 2006; Co-Director of Growth Management Studies, College of Law, University of Florida, 1985 – 1992; Professor of Economics, Florida Atlantic University, Boca Raton, Florida, and Associate and Acting Director, Joint Center for Environmental and Urban Problems of Florida Atlantic and Florida International Universities, 1969 - 1985. He has a Ph.D. in Economics from the University of Illinois.

**Holly Osborn, Senior Financial Management Analyst, Surprise, AZ**

Holly manages development agreements, impact fee credits and reimbursements for the City of Surprise.

**John Osborne, AICP, Planning and Zoning Official, Manatee County, Bradenton, FL**

John attended one of the first Impact Fee Roundtable meetings in Orlando in the early 1990s during his Pinellas County planning internship. He was involved with impact fees since late 1990's as a planner for Charlotte County. He worked for Manatee County since 1997 in progressively responsible positions in land use, transportation, infrastructure and capital improvement planning. He is responsible for the County's impact fee program as Planning Director and again under County Administration.

**Jonathan B. Paul, AICP, Principal, NUE Urban Concepts, LLC, Gainesville, FL**

Mr. Paul holds an undergraduate degree from Florida State University and a Masters in Urban Planning from the University of Florida and a Master's in Public Administration from the University of South Florida. Jonathan worked as a principal planner with Hillsborough County focusing on transportation, concurrency and impact fees. He worked for several years as the Concurrency and Impact Fee Manager for Alachua County. He was a co-principal author along with Jeff Hays on Alachua County's award-winning Mobility Plan. In 2011, Mr. Paul started NUE Urban Concepts working with local and state governments and private developments on developing innovative and creative solutions for addressing mobility. Jonathan is the lead planner for the Celebration Pointe TOD. He has just recently completed a Mobility Fee for the City of Altamonte Springs, Florida and Osceola County, Florida. He is currently working on development of a Mobility Plan and Mobility Fee for the City of Maitland, Florida and Sarasota County, Florida. Mr. Paul has served on numerous land use and transportation statewide technical review committees and advisory boards. Jonathan has started work recently on preliminary planning for several additional mixed-use developments through Florida.

**Tom Polk, Impact Fee Administrator, Sarasota County, Sarasota, FL**

Tom is the Impact Fee Administrator for Sarasota County. With over 28 years of experience, his positions with the County have included serving as the Director of Planning and Development Services, Public Works Senior Manager, and Development of Regional Impact Coordinator.

**Susan Schoettle, Attorney, Susan Schoettle-Gumm, PLLC, Sarasota, FL.**

Susan is an attorney whose legal practice focuses on impact fees and many other local government revenue mechanisms. Her experience combines ten years as an Assistant County Attorney with Sarasota County, Florida and over twenty years as a legal consultant. This background provides a unique perspective on legal, policy, and management issues in funding public infrastructure and services from the viewpoints of elected officials, developers, citizens and staff.

**Tyson Smith, AICP, Attorney, White & Smith Planning and Law Group, Charleston SC**

Tyson Smith is an attorney and planning consultant with White & Smith, where his practice includes impact fee development, adequate public facilities systems, transferrable development rights, zoning matters, taking evaluation and avoidance strategies, military planning projects, and other land use areas. Mr. Smith speaks extensively and has published on these topics as well.

**Jonathan Slason, PE, Senior Engineer, RSG, Burlington, VT**

Jonathan focuses on connections with the built environment through the ways we plan for, design, and continue to maintain and fund our infrastructure. Jonathan's education in economics and civil engineering enable him to take the conceptual and translate that into tangible action. He manages RSG's east coast traffic operations, transportation planning, and engineering design practices. Jonathan has worked internationally on mixed use land use projects and the effects on multi-modal capacity, and has developed several fair share contribution systems to fund local transportation improvements in addition to municipal and statewide impact fee systems in the Northeast.

**Robert D. Spencer, Urban Economics, Oakland, CA**

Robert Spencer has 30 years of experience providing land use, economic, and financial consulting services to local and regional public agencies. The firm has a deep understanding of

the connections between land use and fiscal policies, and business and real estate markets. For most of his career, Mr. Spencer built and led successful consulting practices with regional and national consulting firms, most recently with Willdan Financial Services. In March 2009 Mr. Spencer became a sole practitioner based in Oakland, California. Mr. Spencer's core areas of expertise include (1) economic and fiscal impact analysis of plans, programs, and policies, and (2) funding and financing strategy development and implementation for public services and infrastructure needed to support a community's growth and revitalization. He is an expert in the adoption and implementation of a wide range of revenue strategies including taxes, fees, charges, and benefit assessments, and is a recognized national expert in development impact fees. Mr. Spencer has a degree in Urban Economics from the Harvard University Kennedy School of Government.

**Steven A. Tindale, P.E., AICP, CEO, Tindale Oliver, Tampa, FL**

Steve Tindale has 40 years of experience in planning, designing, and managing public infrastructure studies and public facility projects. His extensive background in city government includes serving as Director of Public Works for the City of Tampa, where he was responsible for all planning engineering projects and the overall administration of the department. His areas of expertise include infrastructure planning, comprehensive plans, traffic engineering, public finance studies, parking studies, safety analyses, and crash data management systems. Steve's experience enables him to provide guidance and quality control to the finance, engineering, and planning projects in which Tindale Oliver specializes for public agencies.

**Jason Utley, Planner, Sarasota County Public Works, Sarasota, FL**

Jason is a Planner with Sarasota County responsible for day-to-day impact fee administration and transportation planning. Jason is a graduate of the University of Tennessee specializing in Geography. Mr. Utley has over 15 years planning and project management experience and has worked with the Southwest Florida Regional Planning Council and Manatee County.

**Marshall Willis, Senior Management Analyst, Dept. of Planning & Community Development, Atlanta, GA**

Marshall Willis is considered one of the leading impact fee subject matter experts. Marshall serves as the City of Atlanta's impact fee coordinator, and is currently the project manager overseeing Atlanta's impact fee update. He received a BA from Emory University, a Master of City and Regional Planning from Georgia Institute of Technology, and a Master of Science in Real Estate from Georgia State University. Over the past seven years, Marshall's ability to effectively plan has made a major impact on the city of Atlanta. This is evident in his work in transportation planning with the Atlanta Regional Commission where he was responsible for programming over \$120 million in federal transportation dollars across the region. In his current role at the City of Atlanta he is charged with developing and monitoring the Department of City Planning's budget, as well as serving in a project management role over the City's impact fee program where his planning skills elevated the effectiveness of the program.

**Charles Wu, AICP, CUD, CNU-A, Interim Development Services Director, Coral Gables, FL**

Charles current serves as the Interim Development Services Director for the City of Coral Gables. He was the project manager for the City's recent impact fee update.

**Zhou Yu, PhD, Associate Professor & Director of Financial Planning Program, Department of Family and Consumer Studies, University of Utah, Salt Lake City, Utah**

Zhou Yu is Associate Professor of community studies in the Department of Family and Consumer Studies at the University of Utah, where he also directs the Financial Planning program. His research focuses on the intersection between housing and immigration, studying the housing outcomes and residential assimilation of immigrants in the U.S. He has also examined urban housing reform in China and subsequent changes in housing distribution and consumption. His publications have appeared in peer-reviewed journals such as *Habitat International*, *International Migration Review*, *Real Estate Economics*, and *Urban Studies*. His research has been supported by institutions such as the HUD, the Russell Sage Foundation, and Chiang Ching-kuo Foundation. He is a recent recipient of the Daniels Fund Leadership in Ethics Award. He received his PhD in planning from the University of Southern California.