



CITY OF DEER PARK

PROPOSAL FOR:

WATER AND WASTEWATER RATE STUDY

DECEMBER 26, 2018

Submitted by:



December 26, 2018  
*via email*

Mr. Gary Jackson  
Assistant City Manager  
City of Deer Park  
710 E San Augustine  
Deer Park, TX 77536

**Subject: Deer Park, Texas - Water & Wastewater Rate Study – Scope of Services**

Based on recent conversations, NewGen Strategies and Solutions, LLC (NewGen) is pleased to offer our services to conduct a Water and Wastewater Rate Study (Study) for the City of Deer Park (City). NewGen understands that the primary goal of this engagement is to assess the overall financial stability of the utility, both now and projected into the future reflective of anticipated costs, to determine future rate actions that may be required.

NewGen is excited to be considered to assist the City in conducting this critical project, which is a cornerstone for municipal utilities in achieving future success.

## **Introduction to NewGen**

NewGen Strategies and Solutions (NewGen), established in 2012<sup>1</sup>, is a management and economic consulting firm specializing in serving public sector utilities. NewGen provides financial, cost of service, rate design, valuation, strategy, expert witness, stakeholder, and sustainability consulting services to our clients. Our expertise includes litigation support in state and federal regulatory proceedings, utility business and financial planning, and sustainability strategy for water, wastewater, solid waste, electric, and natural gas utilities.

NewGen was created by consultants who are **dedicated to our client's mission** and recognized as **experts in our respective fields** of service. Our assistance to the public and private sectors is provided with a keen insight to the growing role of stakeholders, resource availability, cost of providing utility services and economic conditions, ensuring an integrated approach to utility operations and services. NewGen has 35 employees in 10 offices nationwide. We believe we are the most qualified firm for this engagement for the following reasons:

- **Prior Water/Wastewater Rate Experience:** NewGen has completed numerous projects, throughout Texas and the nation. We have assisted water, wastewater, solid waste, gas and electric utilities across the United States to evaluate financial feasibility and improve the financial, operational, and management components of these utilities. This opportunity to assist the City is perfectly aligned with our core competencies. A recent client listing is provided in Appendix A.

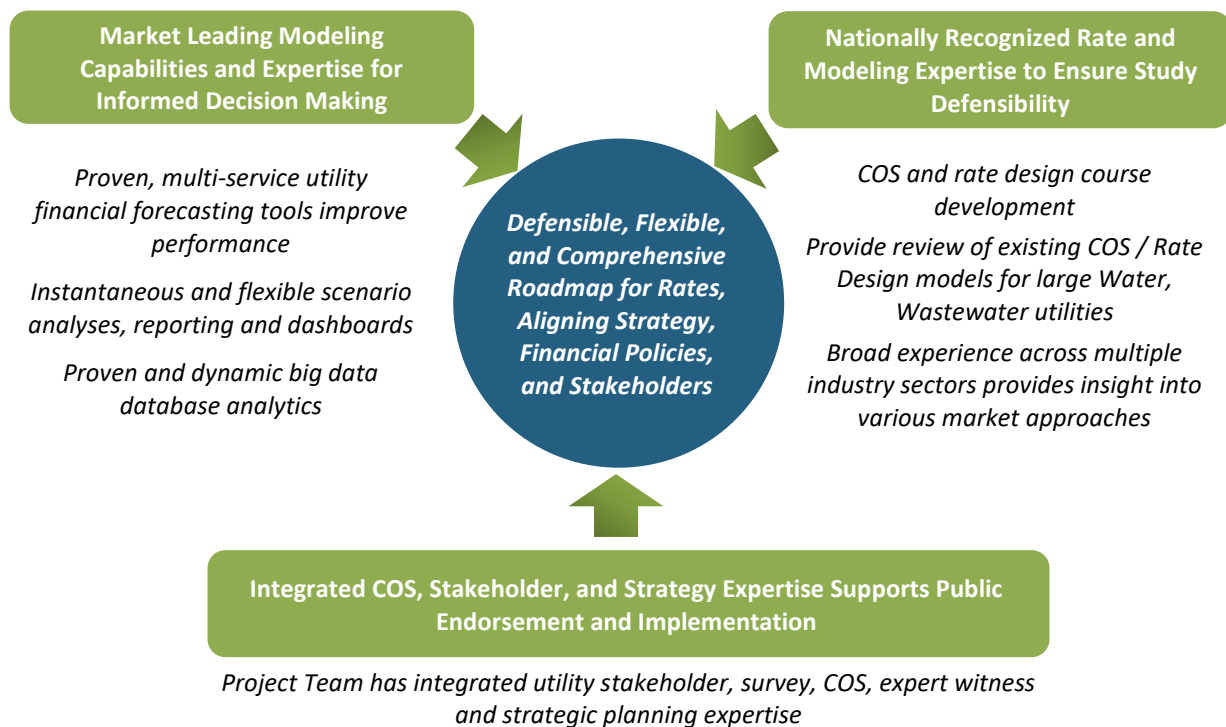
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<sup>1</sup> NewGen was established in 2012 by consultants that left R. W. Beck after its acquisition by SAIC in 2009. Most of them left beginning in 2012, with additional people joining from SAIC in 2013 and 2014. Over 75% of the employees and owners of NewGen were previously employed at R. W. Beck and/or Reed, Stowe & Yanke, LLC.

- **Proposed Project Manager, Mr. Matthew Garrett:** Mr. Garrett will serve as the primary contact for this engagement and has over 16 years of local government and public sector experience, the last five of which have been in a consulting role. He is a Certified Public Manager, a Certified Government Finance Officer, and holds an MBA from the University of Texas at Dallas. Mr. Garrett applies his formal training and experience as a municipal Finance Director for clients by leading financial planning, cost of service rate design, stakeholder engagement, and economic feasibility analysis projects. He has completed a variety of cost of service and rate design studies for engagements with water, wastewater, natural gas and stormwater utilities. Mr. Garrett has assisted in the completion of impact fee, valuation, litigation support, and feasibility engagements.
- **Understanding of Goals:** We understand the importance of conducting thorough and accurate analyses while developing customer friendly and defensible rates that are easy to understand and update as operating and capital budgets change.
- **Experienced Project Team:** The NewGen Project Team proposed for this engagement has extensive experience in the conduct of cost of service and rate design studies, management plans and operations reviews for water and wastewater.

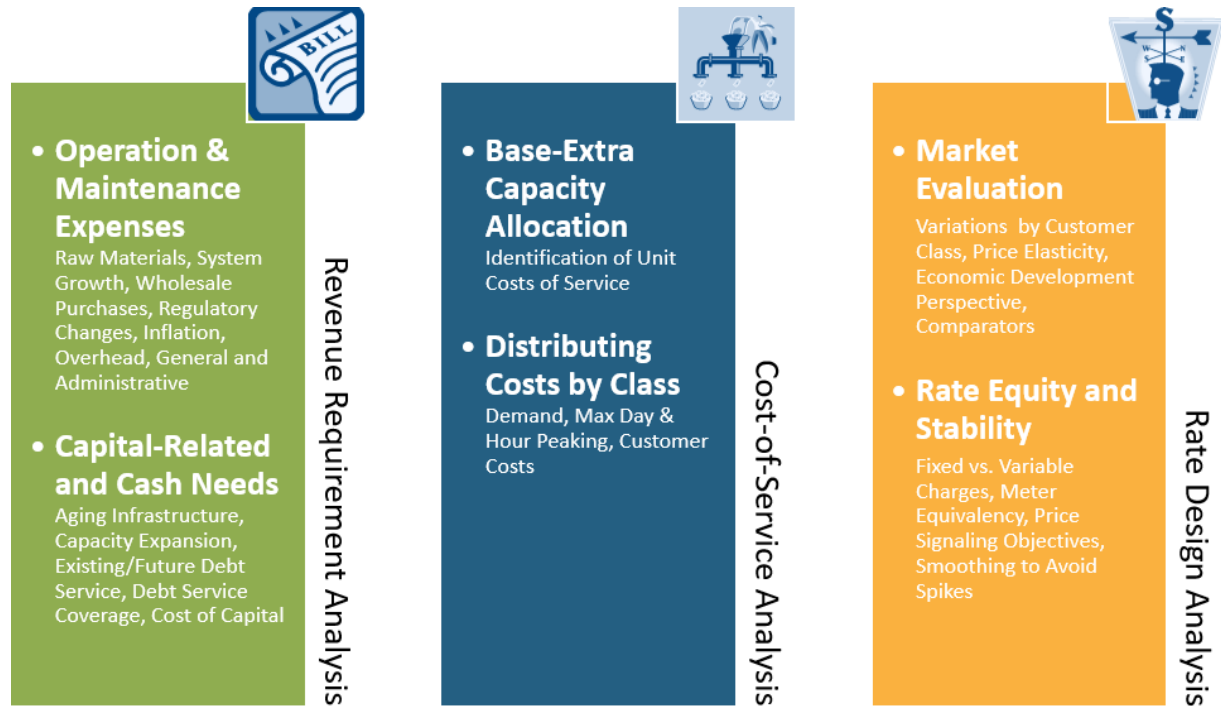
## Scope of Services

Our proposed work plan closely follows the approaches and methodologies utilized by NewGen's Project Team members in all of their water and wastewater cost of service and rate design studies. Therefore, the City can be assured that the work plan proposed by NewGen has been tested and proven in numerous studies across the state and nation. NewGen delivers a unique and integrated approach to supporting the City's utility financial planning and rate related decisions.



NewGen maintains a strong and active presence before the State of Texas' rate regulatory authorities and is routinely requested to provide expert opinions on rate matters by legal counsels representing clients throughout the State of Texas. For NewGen to maintain its reputation and presence within the regulatory environment, our product must be of such quality to withstand intense scrutiny. The product(s) developed by NewGen for this engagement will withstand such scrutiny.

NewGen approaches each rate study with a focus on three major rate study components as illustrated below. A thorough analysis and understanding of each component is crucial to a rate study and successful rate actions.



The following tasks briefly summarize a high-level, draft work plan and estimated timing proposed by the NewGen Project Team to perform the Study. If selected, the Project Team understands that the work plan will be revised and refined with input from City Staff.

### Task 1 – Data Collection and Project Kick-off

At the outset of the project, the City will be provided an initial data request for information needed to begin the study. The Project Team will then review and assess the information to become familiar with the City's operations and policies and, to the extent possible, will test the billing data received for accuracy. On conclusion of the data review and testing, the Project Team will hold a kick-off meeting via teleconference with City staff and applicable project stakeholders. The primary reason for the kick-off meeting is to allow the key Project Team consultants and participants from the City to be introduced and lay the general framework for how the study will be conducted. This meeting will also allow for the finalization of the proposed work approach and will allow the Project Team to gain a better understanding of the political and customer views/opinions of current rates; the capital, demand, and operational changes anticipated over the study period; and the initial rate design pricing objectives of stakeholders.

## **Task 2 – Revenue Requirement and Financial Plan Development**

The revenue requirement will be developed using the cash needs approach, unless otherwise requested by the City. The cash needs approach incorporates a utility's operation and maintenance costs, debt service and bond coverage requirements, cash funded capital outlays, reserve requirements, and transfers. The Project Team will assess and project the cost of service by analyzing the most recent three (3) years of historical actuals, the current budget year, and any forecasts made for future fiscal years.

NewGen will adjust expenditures as necessary (normalize, annualize, etc.) to develop an annual revenue requirement that is representative of the utility's financial needs. In this stage, it will be important to identify the impacts of any future wholesale costs and financial policy objectives. After review, the Project Team will develop a test-year cost of service and will then prepare a forecast of revenue requirements for a five (5)-year period. This forecasted financial plan will consider the impact of population changes, cost inflation, changes in contractual obligations, needed capital improvements and the City's anticipated funding plan for said improvements.

## **Task 3 – Cost of Service Analysis and Customer Class Cost Allocation**

It is our understanding that the City does not desire a full, customer class level cost of service review at this point. For this scope, NewGen has assumed the City will maintain the current customer class and rate structures.

If deemed necessary, after our review of the requested data, NewGen may propose amendments to the City's existing customer classes with specifications regarding the service standards for each class. If the City elects to change customer classifications, additional analysis may be required to allocate costs to the selected customer classes based on each customer class' level of service.

## **Task 4 – Rate Design and Revenue Sufficiency**

Prior to beginning Task 4, members of the Project Team will discuss key policy areas with City staff and the potential rate design alternatives that can meet the City's pricing goals and objectives. These include, but are not limited to:

- Debt service coverage requirements
- Reserve policies
- Industry-accepted best practices
- Any Texas-specific regulatory changes that may arise

As necessary, the Project Team will include an estimation of the impact of the economic concept of the price elasticity of demand. Failure to quantify this interaction between price and consumption in the development of rates can lead to the development of rates which fail to fully recover the utility's cost of service.

The results of this task will provide the data to properly evaluate revenue recovery, the magnitude of potential rate increases, if any. In addition, this will give the Project Team the ability to compare the actual cost to provide utility service with the anticipated billed revenues of the utility.

Members of the Project Team will discuss with City staff the potential rate design alternatives that meet the City's pricing goals. From these discussions, the Project Team will develop rate scenarios that are reflective of industry accepted practices and procedures and rate regulations within the State of Texas

and which balance the recovery of revenue between base rates and volumetric rates in line with City objectives.

### **Task 5 – Results Reporting and Council Engagement**

The Team will develop an electronic draft report summarizing the study’s findings, assumptions, methodologies, and recommendations. The Project Team is committed to ensuring that the City staff thoroughly understands the recommendations in the draft report and will be available to discuss findings, answer questions, and receive input. Upon receipt of City staff comments, the Project Team will make appropriate changes and provide the City with the final report. After completion of the final report, the Project Team will develop the necessary materials to formally present the results of the study in a meeting with the City Council or public hearing, if requested.

### **Task 6 – Rate Model and Training Session (Optional)**

NewGen prides itself in developing user-friendly models which are specific to, and reflect the unique operational characteristics of, each client. If desired, the model provided to the City will be built to be compatible with the latest version of Microsoft Excel and provide a fully functional version of the model on flash drive or another chosen media. Additionally, both a fully protected version and an unlocked version of the model will be provided to ensure staff has a tool that can be deployed to all classes of users, from novice to advanced. The development of the financial forecasting and rate model will occur throughout the course of the project.

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**Our models include visual and numeric dashboards designed to dynamically and instantly manage, manipulate, and evaluate large amounts of data. The dashboards instantly and easily convey the key financial metrics, consumption changes, customer impacts, and rate structures to customers, staff, and councils.**

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The City’s model will allow staff to run “what-if” scenarios including, but not limited to, changes in operating, capital and wholesale costs, customer and volume growth or decline, debt service structure, source costs, inflation, capital project financing and funding sources. To ensure the model is fully useable by staff, the Project Team will conduct a hands-on training session with key model stakeholders when the model is delivered, discuss every worksheet within the model and fully demonstrate its functionality.

Once the project has been finalized, the Project Team will work to form this model into a “user-friendly” program for use by City Staff.

### **Timetable for Completion**

Subject to timely response to information and data requests as well as availability of data, NewGen will have draft results for discussion with City staff within 90 to 120 days from notice to proceed. The various phases of this Study will be conducted concurrently, to the extent possible, which ensures that the Study is moving forward in a cost-efficient manner.

## Project Team

NewGen has assembled a Project Team based out of our Richardson, Texas office. Complete resumes for each Project Team member are available upon request.

### Matthew Garrett | Project Manager



Mr. Matthew Garrett, Executive Consultant in our Richardson office, will be responsible for providing the requested services, and will coordinate and work in coordination with City Staff and the City's Consulting Engineer during the engagement.

Mr. Garrett joined NewGen Strategies and Solutions in October 2013 and brings a broad range of experience to the project. Prior to joining NewGen, he served as the Finance Director for the Town of Prosper, Texas for over five (5) years. Before his time in municipal government, he was employed by Collin County holding the titles of Senior Financial Analyst, HR Supervisor and HRIS Analyst. Matthew earned his undergraduate in Management from Texas A&M, holds an MBA focusing on Organizational Strategy from the University of Texas at Dallas, and received his Certified Public Manager designation from Texas State University.

### Chris Ekrut | Quality Assurance/Quality Control



Mr. Chris Ekrut has been providing rate-making consulting services since 2004, with the majority of his consulting experience centered in the water and wastewater industry. Mr. Ekrut has filed expert witness testimony with regards to cost of service determination and rate design, as well as provided litigation support and expert witness testimony development before the rate regulatory agencies of the State of Texas. He has also conducted a number of wholesale and retail water and wastewater rate studies, developed water, wastewater, and stormwater rate models, and assisted in the negotiation and/or litigation involving a number of wholesale water contracts. Mr. Ekrut also specializes in the development of Utility Business Plans and has been called on by the Texas Section of the American Water Works Association to speak on the importance of business planning for municipal utilities. Most recently, Mr. Ekrut was engaged by the Office of Public Utility Counsel (OPUC) to assist in providing technical review and guidance for on-going rule-making actions of the Public Utility Commission (PUC), as well as to serve as OPUC's expert witness in two contested rate filings by investor owned utilities in the state.

### Michael Sommerdorf | Financial Analyst and Data Analytics Expert



Mr. Michael Sommerdorf, Analyst in our Richardson office, will serve on the Project Team providing financial modeling, large data manipulation and financial analysis services.

Mr. Sommerdorf joined NewGen Strategies and Solutions, LLC as an Analyst in 2016 shortly after attaining a Bachelor of Business Administration in Accounting and recently completed his Master of Science in Business Analytics at the University of Texas at Dallas.



## Megan Kirkland | Analyst



Ms. Megan Kirkland joined NewGen in May 2018 as a Staff Consultant and provides analytical support, and assistance with industry and project research. Prior to NewGen, Ms. Kirkland worked with Robert Half as an Accounting Contractor, and graduated from Texas A&M with a Petroleum Engineering degree, and minor in Business Administration.

## Project Fees

Based on the scope of work outlined herein, the Project Team estimates **Tasks 1 through 5** can be provided for an estimated fee of **\$27,500**, inclusive of out-of-pocket expenses. This proposed fee assumes one (1) on-site meeting. Other meetings or discussions will be held by teleconference in an effort to provide the requested services as economically as possible.

In our discussions, City staff indicated the City may be interested in receiving a completed financial model for rate setting that staff could use to support rate decisions in future years. This was described in the scope as an *Optional Task* and is priced separately. To **finalize the rate model and train City staff on its use as discussed in Task 6**, NewGen guarantees the cost to complete the rate model will not exceed **\$4,000**. This includes the cost of one on-site, hands-on training session with City staff.

NewGen invoices its clients monthly for actual services performed plus out-of-pocket expenses incurred at cost. Payment is due within thirty (30) days of the invoice date. This agreement is subject to cancellation within thirty (30) days prior written notice provided to NewGen. In the event of cancellation, all labor and expense charges incurred by NewGen through the date of cancellation will be considered due at the time notice of cancellation is delivered, regardless of work product and/or engagement status.

The estimated fee proposed herein will remain in effect ninety (90) days from the date of this proposal.



NewGen has been selected through a competitive procurement process by HGACBuy. This contract award allows government entities nationwide to contract our services directly, without the issuance of a request for proposal (RFP). H-GAC's Cooperative Purchasing Program, known as HGACBuy, is a nationwide procurement service that was established pursuant to Texas' "Interlocal Cooperation Act". The "Act" allows local governments and certain non-profits to use contracts appropriately established by another government entity. Use of the Program for a particular purchase by any government entity is strictly at the discretion of that entity.

## Rates for Additional Professional Services

Our consultants have come together to offer our clients a myriad of expertise and experience gained from a variety of engagements throughout the state and nation. To enhance effective utility management these services are varied and can be tailored according to the needs of the City.

Services that may be requested by the City, but not included in the scope of services outlined above can be provided at a negotiated price based on our currently standard hourly billing rates as shown below, and expenses as incurred.

Assistance provided to the City will be performed at the direction of the Assistant City Manager, or other designated staff. As services are requested and performed, NewGen will invoice the City on a monthly



basis for actual hours worked at our then applicable hourly billing rates, plus out of pocket expenses incurred at cost. Payment is due within thirty (30) days upon receipt of invoice.

Payment is due within thirty (30) days upon receipt of invoice. Our current hourly billing rates, which will remain in effect through December 31, 2019, are as follows:

**NewGen Strategies & Solutions  
2019 Billing Rates**

<b>Position</b>	<b>Billing Rate</b>
President	\$275 - \$315
Director/Executive Consultant/Vice President	\$195 - \$305
Senior Consultant	\$175 - \$195
Staff Consultant	\$130 - \$160
Analyst	\$100 - \$120
Administrative Assistant	\$90

Note: Billing rates are subject to change based on annual reviews and salary increases.

NewGen looks forward to assisting the City of Deer Park and appreciates the opportunity to propose our services to complete this important engagement! If you have any questions, please feel free to contact Mr. Matthew Garrett at 972.675.7699 or via email at [mgarrett@newgenstrategies.net](mailto:mgarrett@newgenstrategies.net).

Sincerely,

**NewGen Strategies and Solutions, LLC**



Matthew B. Garrett  
Executive Consultant

## **APPENDIX A – CLIENT LISTING**

NewGen has unparalleled professional experience in providing financial, managerial and economic consulting services to public sector utilities. Members of our Project Team have assisted an extensive list of clients in conducting wholesale and/or retail water, wastewater, storm water, solid waste, electricity and natural gas cost of service and rate design studies. We often provide other financial and/or management consulting services to these same clients on an as needed basis.

Municipalities which have engaged members of our Project Team for water, wastewater and/or solid waste services include, but are not limited to, the following:

### **Water and Wastewater Services**

- Town of Addison, Texas – Mr. Eric Cannon, Finance Director (972) 450-7050  
Water Rate Study, 2013
- City of Aledo, Texas – Mr. Ken Pfiefer, City Administrator (817) 441-7016  
Water/Wastewater Rate Study, 2010, 2011, 2013, 2014, 2015, 2016, 2017, 2018
- Argyle Water Supply Corporation – Mr. Randall Davis, General Manager (940) 464-7713  
Rate and Impact Fee Study, 2012
- City of Bartlesville, Oklahoma – Mr. Mike Bailey, Administrative Director (918) 338-4212  
Water and Wastewater Cost of Service Study, 2014  
Solid Waste Cost of Service Study, 2011
- City of Blue Mound, Texas – Mr. Alan Hooks, Mayor (817) 232-7097  
Valuation, 2015
- City of Bonham, Texas – Mr. Dave Struchtemeyer, Finance Director (903) 583-7555  
Water/Wastewater Rate Study, 2014, 2018
- Booth, Ahrens & Werkenthin, P.C. – Mr. Mike Booth (512) 472-3263  
Trophy Club Litigation Support, 2013
- City of Borger, Texas – Mr. Eddie Edwards, City Manager (806) 273-0902  
Multiple Water and Wastewater Cost of Service and Feasibility Studies, 1995, 1997, 1998, 2010, 2013
- City of Brenham, Texas – Mr. Lowell Ogle, Director of Public Utilities (979) 337-7593  
Cost of Service and Water Rate Study, 2012, 2018
- Buena Vista-Bethel Special Utility District – Mr. Joe Buchanan, General Manager (972) 937-1212  
Water Cost of Service and Impact Fee/Rate Design Study, 2015
- City of Burkburnett, Texas – Mr. Gordon Smith, Director of Public Works (940) 569-2263  
Water Rate Study, 2014, 2015, 2017, 2018

- City of Burnet, Texas – Mr. David Vaughn, City Manager (512) 756-6093  
Water Rate Study, 2012, 2013
- Canyon Regional Water Authority – Mr. David Davenport, Executive Director (830) 609-0543  
Water Rate Study, 2012
- Carollo Engineers – Mr. Jeff Stovall, Senior Technologist (806) 681-8275  
Barton Springs Edwards Aquifer Conservation District Brackish Groundwater Feasibility Study, 2016
- City of Coleman, Texas – Mr. Paul Cetoe, City Manager (325) 625-5114  
Water Rate Study, 2012
- City of Conroe, Texas – Mr. Collin Boothe, Director of Finance, (936) 522-3049  
Water and Wastewater Rate Consulting Services, 2016, 2017, 2018
- CP&Y, Inc. – Mr. John Levitt, P.E. (214) 640-1709  
Killeen, Texas Drainage Study, 2012, Water Rate Study, 2012, 2013  
Roanoke, Texas Economics and Rates, 2014
- City of Denton, Texas – Mr. Tony Puente, Assistant Finance Director (940) 349-7283  
Economics and Rates Cost Allocation Model, 2012, 2013, 2016
- Double Diamond Utilities, Inc. – Mr. Randy Gracy, President (214) 706-7801  
Water Rate Study, 2010, 2011, 2012, 2013, 2014  
Regulatory and Litigation Support, 2015
- City of Farmersville, Texas – Mr. Ben White, City Manager (972) 782-6151  
Economics and Rates Water Rate Study, 2014
- City of Fate, Texas – Ms. Li Jen Lee, Finance Director (972) 771-4601 ext. 111  
Water and Wastewater Cost of Service and Rate Design Study, 2016, 2017, 2018
- City of Forest Hill, Texas – Mr. Sheyi Ipaye, City Manager (817) 568-3000  
Economics and Rates, 2014
- City of Forney, Texas – Mr. Brian Brooks, City Manager (972) 564-7301  
Strategy and Sustainability Utility Service Plan, 2014
- City of Fort Worth, Texas – Ms. Kara Shuror, Assistant Director (817) 392-8819  
Wholesale Water Contract Assistance, 2010  
Water and Wastewater System Privatization Analysis, 2013  
Bio-solids Forensic Audit, 2015  
Wholesale Wastewater Contract Assistance, 2015-2017

- City of Garland, Texas – Ms. Sharon Bailey, Finance Manager (972) 205-3210  
Cost Allocation Study, 2012  
Economics and Rates Cost Allocation Study, 2012
- City of Glenn Heights, Texas – Ms. Trudy Lewis, City Manager (972) 223-1690  
Water Rate Study, 2010, 2018
- City of Graham, Texas – Mr. David Casteel, City Manager (940) 549-3322  
Water Rate Study Rate Model Review, 2012, 2013, 2014
- City of Grapevine, Texas – Mr. Kent Conkel, Director of Utilities (817) 410-3330  
Water Rate Study Rate Model Review, 2012
- Greater Ouachita Water Company – Mr. Tommy Sparks, President (318) 398-2204  
Multiple Water and Wastewater Cost of Service and Rate Design Studies, 2007, 2013  
Water System Facility Appraisals, 2010, 2014
- Herrera & Boyle, PLLC – Ms. Kim Boyle (512) 474-1492  
Litigation Support Southwest Water Rate Dispute, 2012, 2013
- City of Hobbs, New Mexico – Mr. Tim Woomer, Utilities Director (575) 397-9315  
Water and Wastewater Cost of Service Studies, 1996, 2001, 2003, 2013
- Johnson County Special Utility District – Mr. Terry Kelley, General Manager (817) 760-5200  
Wholesale Water Rate Study, 2015
- Kimley-Horn and Associates, Inc. – Mr. Jeff Whitacre, Associate  
City of McKinney Impact Fee Study, 2013  
City of Frisco Economics and Rates Impact Fee Study, 2014, 2018  
City of Killeen Economics and Rates Transportation Utility Study, 2014  
City of Flower Mound Economics and Rates Impact Fee Study, 2015
- Lake Fork Water Supply Corporation – Ms. Rachel Anderson, Office Manager (903) 383-7643  
Water Cost of Service and Rate Design Study, 2015
- City of Lakeside, Texas – Mr. Norman Craven, Interim Town Administrator (817) 237-1234  
Valuation Water Rate Study, 2012
- City of Lancaster, Texas – Ms. Opal Robertson, City Manager (972) 218-1300  
Economics and Rates Water Rate Study, 2013, 2014, 2017, 2018
- City of League City, Texas – Ms. Nancy Massey, Utility Billing Manager (281) 554-1336  
Economics and Rates, 2014
- City of Lewisville, Texas – Mr. Clifford Howard, Fiscal Services Manager (972) 219-3422

Castle Hills Economics and Rates Rate Review, 2015

- City of Mansfield, Texas – Mr. Joe Smolinski, Director of Water Utilities (817) 477-2248  
Water Rate Study, 2013
- Manville Water Supply Corporation – Mr. Greg Teggegan, (512) 856-2488 ext. 230  
Multiple Retail and Wholesale Cost of Service and Rate Design Studies; and Impact Fee Studies, 2001, 2011, 2013
- Mathews & Freeland, LLP – Mr. Joe Freeland (512) 404-7800  
Oak Hollow Valuation Water Rate Study, 2012
- City of Murphy, Texas – Ms. Linda Truitt, Finance Director (972) 468-4119  
Economics and Rates Cost of Service and Rate Study, 2014, 2017, 2018
- City of Nacogdoches, Texas – Ms. Pam Curbow, Finance Director (936) 559-2526  
Water, Sewer, and Solid Waste Cost of Service and Rate Design Study, 2015-2016
- Navajo Tribal Utility Authority – Mr. Thomas Nelson, Chief Financial Officer (928) 729-5727  
Economics and Rates Tariff Manual Update, 2014  
Economics and Rates Water/Wastewater Rate Study, 2015
- Nueces County WCID #3 – Mr. James Schwartz, Interim General Manager (361) 387-4549  
Economics and Rates Water Rate Study, 2015
- Office of Public Utility Council – Ms. Laurie Barker (512) 936-7500  
Regulatory and Litigation Support, 2015, 2017, 2018
- City of Paris, Texas – Mr. Gene Anderson, Finance Director (903) 784-9241  
Economics and Rates Water and Wastewater Rate Study, 2014, 2015
- City of Pflugerville, Texas – Ms. Lauri Gillam, Assistant City Manager, (512) 990-6101  
Water and Wastewater Cost of Service and Rate Design Study
- Pittsburg Water & Sewer Authority – Mr. Joey Tolbert, Interim Director of Finance (412) 255-8800  
Economics and Rates Audit, 2013, 2014
- City of Portland, Texas – Ms. Michel Sorrell, Finance Director (361) 777-4500  
Economics and Rates Water Rate Study, 2014
- Town of Prosper, Texas – Ms. Kim Galvin, Interim Finance Director (972) 569-1019  
Economics and Rates Water Rate Study, 2012, 2013, 2014
- City of Reno, Texas – Mr. Buddy Heuberger, Mayor (903) 491-5867  
Water Rate Study, 2012
- City of Roanoke, Texas – Ms. Vicki Rodriguez, Finance Director (817) 491-2411  
Economics and Rates Water Rate Study, 2014

- City of Rockport, Texas – Mr. Kevin Carruth, City Manager, (361) 729-2213, ext. 221  
Economics and Rates Water, Wastewater and Natural Gas Rate Study, 2016, 2017, 2018
- Rockett Special Utility District – Ms. Kay Phillips, General Manager (972) 617-3524 ext. 212  
Retail and Wholesale Water Cost of Service and Rate Design Study, 2012, 2016  
Certificate of Convenience and Necessity (CCN) Valuation Analysis, 2012
- City of Seagoville, Texas – Mr. Patrick Harvey, Finance Director (972) 287-2050  
Water Rate Study, 2013 and Annual Support Since
- Shannon, Gracey, Ratliff & Miller, LLP – Mr. Wes Maness (817) 299-2843  
Litigation Support Arlington-Gas Well, 2012, 2014
- Sharyland Water Supply Corporation – Ms. Sherilyn Dahlberg, General Manager (956) 585-6081  
CCN Valuation Analysis, 2015  
Water Cost of Service and Rate Design Study, 2016
- City of Sugar Land, Texas – Ms. Jennifer Brown, Director of Finance (281) 275-2236  
Multiple Water and Wastewater Cost of Service Studies, 2006, 2010, 2012
- City of Temple, Texas – Ms. Traci Barnard, Director of Finance (254) 298-5631  
Multiple Water and Wastewater Cost of Service Studies, 2002, 2006, 2012
- City of Terrell, Texas – Mr. Steve Rodgers, City Engineer (972) 551-6607  
Water Rate Study, 2013, 2015, 2018
- Trinity River Authority – Ms. Julie Hunt, Assistant Regional Manager (817) 493-5100  
Bio-solids Market Analysis, 2016
- Trophy Club Municipal Utility District – Ms. Jennifer McKnight, General Manager (682) 831-4600  
Water Rate Study, 2013, 2014, 2016-17 Updates
- City of Tyler, Texas – Mr. Greg Morgan, Director of Utilities (903) 531-1234  
Water Rate Study, 2013
- City of Waco, Texas – Mr. Wiley Stem, Assistant City Manager (254) 750-5640  
General Services Water Rate Study, 2012, 2013, 2016, 2017, 2018  
General Rate Consulting Water Rate Study, 2012  
Cost of Service and Water/Wastewater Rate Study, 2013, 2014
- City of Weatherford, Texas – Ms. Sharon Hayes, Assistant City Manager (817) 598-4270  
Economics and Rates Cost of Service Rate Study, 2013, 2014
- City of Willow Park, Texas – (817) 441-7108  
Water Rate Study, 2013, 2014