

## Qualifications and References

Last update: October 30, 2019

Accessible electronically at <https://gettinggreatrates.com/>, "Freebies" link

### General

GettingGreatRates, LLC, doing business as GettingGreatRates.com (GGR), was formed by Carl Brown on April 16, 2008, in Missouri as a limited liability company. GGR does *comprehensive utility rate analysis, training and related hands-on assistance. It also produces rate setting spreadsheet templates and written guidance on rates-related issues.* (GGR was formed to succeed its forerunner company, Carl Brown Consulting, LLC and to enhance service offered by the previous company. GGR operates nationally from a single office in Jefferson City, Missouri. Our NAICS Code is 541618, described as, "utilities management consulting services."

### Staff

**Carl Brown** serves as president of the firm. Mr. Brown graduated from Missouri University in 1977 with a B.S. in Forestry. Through 1989, Mr. Brown managed corporate timberlands, related personnel, contracts and operations. A corporate buyout ended that career.

From 1989 through 1991, Mr. Brown worked as a municipal lease-purchase finance originator with two municipal finance firms.

From 1991 through 2005, Mr. Brown provided water and sewer finance and local government technical assistance with the Missouri Department of Natural Resources. He coordinated Clean Water State Revolving Fund (CWSRF) loans and State grants. In that capacity he served as the SRF user rate structure compliance officer for the CWSRF program. He developed the pre-cursor to the rate model that is now called, "Rate Assist." This program is the State's template for compliant CWSRF rates. Mr. Brown developed the "Show-me Ratemaker" program, a do-it-yourself rate calculation program. Mr. Brown and the unit he headed helped cities and other utility providers solve financial and rate problems in order to fund compliant utilities and satisfy grant and loan requirements.

In late 2005, Mr. Brown left State employment and launched his water and sewer rate analysis practice. In 2007, he began performing electric and solid waste rate analyses, as well. In 2013, he started stormwater rate and fee analysis. **Mr. Brown has completed 315 rate analyses as of the date above.** He develops rate analysis and related software and guidance materials. That includes the book, "How to Get Great Rates," the "Rate Setting Issues Guide," spreadsheets for calculating the cost and rate impacts of capital improvements and equipment repair and replacement, and dozens of articles on rates-related issues for trade journals. Many of these resources are available at <https://gettinggreatrates.com/>.

Presenting to approximately 300 people each year, Mr. Brown trains community leaders and assistance providers all over the U.S. on rate setting, rate analysis, asset management, capital improvement planning, repair and replacement scheduling and other issues related to rate setting.

**Jacki Hicks**, the firm's vice-president, graduated from Missouri Southern State University with a B.S. in Business Administration, emphasis in accounting, in 1991. She prepares analysis models, especially those for analyses that require complex databases. She performs data entry and quality control. Ms. Hicks has approximately 24 years of experience in accounting, financial assurance and complex spreadsheet and database design. Seven of those years have been devoted to water and sewer rate analysis. She develops substantial components of the rate analysis templates we use. Disclosure: Mr. Brown and Ms. Hicks have been happily married since 1998.

#### **Firm Revenues**

All firm revenues come from doing rate analyses; helping clients adjust user charge rates, fees and policies; serving as an expert witness in rates-related lawsuits and rate disputes; and conducting rate setting workshops and training.

#### **Example Rate Analysis Reports**

A representative selection of approximately 12 rate analysis report packages from past clients is available at <https://gettinggreatrates.com/> under the "Freebies" link.

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Following are lists of every rate analysis project done by the firm since 2014 (no cherry picking), with the most recent (on-going projects) listed first. All projects have been completed on schedule or promptly after clients produced all needed data (clients sometimes gather data slowly and otherwise delay their own projects). As to fees, except for lawsuit projects, nearly all projects are done on a lump-sum fee basis, so none has gone over budget.

*Note: This document includes e-mail addresses for almost all the following contacts. To protect these folks from spammers and spoofers, please be careful about how you use these addresses.*

#### **The "RATES" Programs and Projects Done Through Those Programs**

GGR was chosen by six rural water associations to serve as the analyst for their "RATES" Programs (*Rate Analysis and Training for Environmental Systems*; vehicles for delivering great rate analyses to association member systems for discounted fees, and related training). Visit <https://gettinggreatrates.com/> and click on the state links to learn more. To see results of rate analysis projects, visit <https://gettinggreatrates.com/consulting/RATESResults.pdf>. While other analysts could apply to participate in these programs, to-date, GGR is the only analyst authorized to provide services through these programs.

Following are the contacts for these programs plus the projects carried out under each program, listed by year completed:

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**Colorado RATES Program**, initiated in 2017, Colorado Rural Water Association (CRWA) – Steve Harper, Executive Director, (719) 225-7338, [sharper@crwa.net](mailto:sharper@crwa.net)

- South Fork Water and Sanitation District, South Fork, CO, sewer, 769 equivalent residential units. Fee: \$5,405. Ron Carpenter, District Manager, (719) 873-5860, [sfsan@sfwsd.org](mailto:sfsan@sfwsd.org)
- 2019, Palmer Lake, CO, water, 900 connections. Fee: \$5,887. Valerie Remington, Finance Officer/H.R. Director, (719) 481-2953, [valerie@palmer-lake.org](mailto:valerie@palmer-lake.org)
- 2018, Purgatory Metro District, Durango, CO, water, sewer, 620 Equivalent Residential Units. Fee: \$10,195. Eric Hassel, District Manager, (970) 799-6383, [hasselpmd@outlook.com](mailto:hasselpmd@outlook.com)

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**Kansas RATES Program**, initiated in 2012, Kansas Rural Water Association (KRWA) – Elmer Ronnebaum, General Manager, [krwa@krwa.net](mailto:krwa@krwa.net); and Greg Duryea, Assistant General Manager, [greg@krwa.net](mailto:greg@krwa.net), (785) 336-3760

- Bonner Springs, KS (re-engagement following 2008 analyses and 2017 analyses due to changed conditions), water, sewer, stormwater, 2,815 connections. Fee: \$21,173. Tillie Laplant, Finance Director, (913) 667-1745, [Tilliel@bonnersprings.org](mailto:Tilliel@bonnersprings.org)
- 2019, Tonganoxie, KS, water, sewer, 1,969 connections. Fee: \$11,353. George Brajkovic, City Manager, (913) 845-2620, [gbrajkovic@tonganoxie.org](mailto:gbrajkovic@tonganoxie.org)
- 2018, Cowley County, KS RWD #5, water, 750 connections, including 3 wholesale, one of which threatened a lawsuit, which appears to have been averted by this analysis. Fee: \$6,508. Vicky Sprengeler, Business Manager, (620) 438-2501, [CowleyRWD5@sktc.net](mailto:CowleyRWD5@sktc.net)
- 2018, Manhattan, KS (re-engagement), stormwater, 29,000 Equivalent Residential Units. See entry below for prior completed project for Manhattan. Brian Johnson, P.E., City Engineer, (785) 587-2455, [johnsonb@cityofmhk.com](mailto:johnsonb@cityofmhk.com)
- 2018, Herington, KS, water, sewer, 1,100 connections. Fee: \$11,465. Brenda Wildman, City Clerk/Finance Director, (785) 258-2271, [brenda@cityofherington.com](mailto:brenda@cityofherington.com)
- 2018, Montgomery County, KS Public Sewer District #2, Independence, KS. Fee: \$8,768. This analysis helped to resolve a wholesale rates lawsuit with the district's contract wastewater treater, the city of Independence. Suit was settled. Jim Wright, Assistant Public Works Coordinator, Montgomery County, (620) 330-1170, [jwright@mgcountyks.org](mailto:jwright@mgcountyks.org)
- 2018, Ellsworth, KS, (re-engagement to assess CIP effects on rates, ran various scenarios in 2017 and 2018 for on-going financial planning, see listing below), water, sewer, 1,100 connections. Fee: \$3,978. Scott Moore, City Administrator, (785) 432-2800, [smoore@ellsworthks.net](mailto:smoore@ellsworthks.net)
- 2017, Emporia, KS, trash, 8,468 customers. Fee: \$5,467. Frank Abart, Public Works Director, (620) 340-6339, [fabart@emporia-kansas.gov](mailto:fabart@emporia-kansas.gov)
- 2017, Bonner Springs, KS (re-engagement following 2008 project), water, sewer, 2,815 connections. Fee: \$12,779. Tillie Laplant, Finance Director, (913) 667-1745, [Tilliel@bonnersprings.org](mailto:Tilliel@bonnersprings.org)
- 2017, Manhattan, KS (re-engagement), water, sewer, 15,782 connections. Fee: hourly, not to exceed \$31,261 for water, sewer and stormwater. Randy DeWitt, P.E., Assistant Public Works Director, (785) 587-2415, [dewitt@cityofmhk.com](mailto:dewitt@cityofmhk.com)
- 2016, Emporia, KS, water, sewer, 8,468 connections. Fee: \$12,296. See listing above.

Note: Mr. Brown presented his analysis report at the Council meeting before the one referenced in the following comments.

We received comments from the Mayor and each member of the Council last night. I would sum up the comments as conveying that the Council appreciated the work that Carl and staff put into the preparation of the report and analysis. The honest evaluation of current and future requirements to run the utility in a responsible manner, together with the thoughtfulness of the evaluation of the impacts to customers was critical. It is now the responsibility of staff and the Council to demonstrate to the public that the proposed structure is based on defensible information and (will serve as) a roadmap for the future of the utility.

–Dan Porter, Assistant City Manager  
Tonganoxie, Kansas

- 2016, Council Grove, KS, water, 1,158 connections. Fee: \$6,040. Derrick Craige, Water Superintendent, (620) 767-5321, [watercg@tctelco.net](mailto:watercg@tctelco.net)
- 2016, Scott City, KS, water, sewer, 1,900 connections. Fee: \$10,960. Mike Todd, Public Works Superintendent, (620) 874-0204, [sccityshop@wbsnet.org](mailto:sccityshop@wbsnet.org)
- 2015, Manhattan, KS, water, sewer, stormwater "State of the Utilities Report," 15,782 connections. Fee: \$12,453. See listing above.
- 2015, La Cygne, KS (re-engagement), water, 469 connections. Fee: \$4,479. This project was completed in approximately two and one-half weeks, our record so far. (This project followed analyses done in 2012 for La Cygne and two water districts that purchased water from La Cygne. I and two law firms initially tried to mediate a dispute between the districts and La Cygne. That failed. The town sued the districts and I subsequently consulted for the two districts to defend that suit. Three years later, and after the suit had been adjudicated largely in the town's favor, the town hired my firm to analyze its rates again. While we did not prevent the lawsuit, I was gratified to be hired to help the town after representing the town's former rivals.) Devona Herrin, Clerk, (913) 757-2144, [lccityhall@peopletelecom.net](mailto:lccityhall@peopletelecom.net)
- 2014, Chetopa, KS (re-engagement), electric, 730 connections. Fee: \$6,228. (Add-on to water and sewer rate analyses done one year before.) Debbie Darnell, Treasurer, Ron Wood, Mayor, (620) 236-7511, [kspacman@kans.com](mailto:kspacman@kans.com)
- 2014, Montgomery County, KS Public Sewer District #2 (see listing above), sewer, 285 connections. Fee: \$3,857. This analysis determined how to adjust the district's internal rates.
- 2014, Crawford Co, KS, Consolidated Rural Water District #2, water, 858 connections. Fee: \$1,893. Analysis to determine rate for a wholesale customer disputing its rate. Dorene Niederklein, District Clerk, (620) 724-8850, [niederklein@ckt.net](mailto:niederklein@ckt.net)
- 2014, Ellsworth, KS, water and sewer, 1,100 connections. Fee: \$8,602. Tim Vandall, City Administrator (since left the City), (785) 472-3288, [tvandall@ellsworthks.net](mailto:tvandall@ellsworthks.net)
- 2014, Atwood, KS, water and sewer, 710 connections. Fee: \$8,845. Janet Stice, City Clerk, (785) 626-9462, [atwoodclerk@sbcglobal.net](mailto:atwoodclerk@sbcglobal.net)

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**New Mexico RATES Program**, initiated in 2013, New Mexico Rural Water Association (NMRWA) – Bill Conner, Executive Director, (505) 884-1031, [bill@nmrwa.org](mailto:bill@nmrwa.org)

- 2016, Dona Ana Mutual Domestic Water Consumers Association, Las Cruces, NM, water, sewer, 5,400 connections. Fee: \$14,904. Jennifer Horton, Executive Director, (575) 526-3491, [jennifer@dawater.org](mailto:jennifer@dawater.org)
- 2014, RAD Water Users Cooperative, Tucumcari, NM, water, 281 connections. Fee: \$6,636. This analysis was to help resolve a wholesale rates lawsuit with RAD's water supplier, Tucumcari. That failed so GGR served as expert witness at trial in November, 2014. Donna Laferty, Clerk, (575) 403-7704, [hogsforfun@yahoo.com](mailto:hogsforfun@yahoo.com)
- 2014, Ranchos De Placitas Sanitation District, water, 91 connections. Fee: \$5,457. Tom Hagan, Board Member, (505) 681-5040, [thagan@nmefcu.org](mailto:thagan@nmefcu.org)

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**North Dakota RATES Program**, initiated in 2013, North Dakota Rural Water Systems Association (NDRWSA) – Eric Volk, Executive Director, (701) 391-5080, [ericvolk@ndrw.org](mailto:ericvolk@ndrw.org)

**Projects:** No rate analyses – yet.

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**Virginia RATES Program**, initiated in 2014, Virginia Rural Water Association (VRWA) – Rebecca Batis, Office Assistant, [email@vrwa.org](mailto:email@vrwa.org), and Myrica Keiser, Executive Director, [mkeiser@vrwa.org](mailto:mkeiser@vrwa.org), (540) 261-7178

- Prince George County, VA (**re-engagement after 2017 analysis due to changed conditions**), water, sewer, 3,200 connections. Fee: \$18,423. Frank Haltom, P.E., (new) Director of Engineering and Utilities, (804) 722-8688, [FHaltom@princegeorgecountyva.gov](mailto:FHaltom@princegeorgecountyva.gov)
- Dinwiddie County Water Authority, North Dinwiddie, VA (**re-engagement following 2015 rate analyses**), water, sewer, 3,200 connections. Fee: \$16,456. Robert B. Wilson, P.E., Executive Director, (804) 861-0998, [RobertWilson@dcwa.org](mailto:RobertWilson@dcwa.org)
- 2017, Prince George County, VA (**re-engagement for analysis update**), water, sewer, 3,200 connections. Fee: \$9,580. Chip England, P.E., Director of Engineering and Utilities, (804) 722-8688, [CEngland@princegeorgecountyva.gov](mailto:CEngland@princegeorgecountyva.gov)
- 2015, Middletown, VA, water, sewer, 570 connections. Fee: \$13,566. Christina Smith, Clerk and Don Riffey, Public Works Director, (540) 869-7731, [publicworks@middletownva.gov](mailto:publicworks@middletownva.gov)
- 2015, Dinwiddie County Water Authority, North Dinwiddie, VA, water, sewer, 3,200 connections. Fee: \$18,158. Robert B. Wilson, P.E., Executive Director, (804) 861-0998, [RobertWilson@dcwa.org](mailto:RobertWilson@dcwa.org)
- 2014, Prince George County, VA, water, sewer, 3,200 connections. Fee: \$12,697. See listing above.

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**Wyoming RATES Program**, initiated in 2013, Wyoming Association of Rural Water Systems (WARWS) – Kathy Weinsaft, Training Specialist, (307) 436-8636, [kweinsaft@warws.com](mailto:kweinsaft@warws.com)

- 2019, Wardwell Water and Sewer District, Mills, WY, water, sewer, 1,584 connections. Fee: \$11,030. Gloria Brainard, District Manager, (307) 265-7034, [wardwellwater@gmail.com](mailto:wardwellwater@gmail.com)
- Northern Arapaho Water and Sewer Department (Wind River Indian Reservation), Ethete, WY, water, approximately 650 connections – in some ways, this is a new system start-up totaling almost \$18M in system construction. GGR is working by subcontract to Argonne National Laboratories (ANL) to initiate rates and management of this system. Fee: \$10,030. ANL contact: Mary Picel, (630) 252-7669, [mpicel@anl.gov](mailto:mpicel@anl.gov)

Carl, your work sells itself. I am pretty sure you get more work from happy customers spreading your worth, word of mouth, than you get from me working with systems. When you start having engineers request your services, which you have had happen, you know you are winning the battle.

–Kathy Weinsaft,  
WARWS Training Specialist

- 3 Creek, a subdivision a few miles out of Jackson, WY, water, sewer, 142 connections. Fee: hourly. 3 Creek is disputing rates assessed by Jackson, its water and sewer service provider. Laurie Stern, Associate Attorney, Wylie Baker LLP, Jackson, WY; and Tina Korpi, Grand Teton Property Management (3 Creek)
- 2019, Wardwell Water and Sewer District, Mills, WY, water, sewer, 1,584 connections. Fee: \$11,030. Gloria Brainard, District Manager, (307) 265-7034, [wardwellwater@gmail.com](mailto:wardwellwater@gmail.com)
- 2019, Riverton, WY, water, sewer, 3,500 connections, sanitation, 3,500 customers. Fee: \$17,973. Tony Tolstedt, City Administrator, (307) 857-7705, [ttolstedt@rivertonwy.gov](mailto:ttolstedt@rivertonwy.gov). (Note: Mr. Tolsted hired my firm previously when he was City Administrator for Douglas, WY. He soon moved to Riverton and subsequently hired my firm again for his new employer. Thus, this was a re-engagement for the same City Administrator, but for different cities.)
- 2019, Douglas, WY, water, sewer, 2,500 connections; sanitation and landfill, 2,500 customers. Fee: \$23,226. Karen Rimmer, City Clerk, (307) 358-3462, [krimmer@cityofdouglas.org](mailto:krimmer@cityofdouglas.org); and Mary Nichol, Treasurer, [mnicol@cityofdouglas.org](mailto:mnicol@cityofdouglas.org)
- 2018, Torrington, WY, water, sewer, six major analysis scenarios in total, 2,800 connections. Lump sum plus hourly fees. Two water and sewer districts and two large industrial customers sued over, or disputed, the City's rates for them. These analyses sought to resolve those suits and disputes. So far, that has been successful. Fee: \$31,595. Lynette Strecker, Clerk/Treasurer, (307) 532-5666, [lstrecker@torringtonwy.gov](mailto:lstrecker@torringtonwy.gov)
- 2016, Pinedale, WY, water, sewer, 1,124 connections. Fee: \$11,037. Hayley Ryckman, Director of Engineering and Zoning, (307) 367-4136, [hayleyryckman@townofpinedale.us](mailto:hayleyryckman@townofpinedale.us)
- 2016, Star Valley Ranch, WY, water, 1,017 connections. Fee: \$7,354. Gregg Wilkes, Town Manager, (307) 883-8696, [admin@starvalleyranchwy.org](mailto:admin@starvalleyranchwy.org)
- 2016, Cody, WY (re-engagement for update of 2015 analysis), electric, 4,115 connections. Fee: \$7,346. Bert Pond, P.E., Electrical Engineer, (307) 527-6532, [rapond@cityofcody.com](mailto:rapond@cityofcody.com)
- 2016, Powell, WY (engagement for analysis of an additional utility following water and sewer analyses in 2014), solid waste, 2,000 customers. Fee: \$4,915. Annette Thorington (since retired), Finance Director, (307) 754-5106
- 2015, Greybull, WY, water, sewer and sanitation, 1,200 connections. Fee: \$13,656. Paul Thur, Town Administrator, (307) 765-9431, [greytown@tctwest.net](mailto:greytown@tctwest.net)
- 2015, Thermopolis, WY, water, 1,400 connections. Fee: \$5,759. Tracey Van Heule, Clerk, (307) 864-3838, [tracey@totclerk.com](mailto:tracey@totclerk.com); Anthony Barnett, P.E. (Subcontracted through Engineering Associates), (307) 864-5297, [Anthony.Barnett@EAengineers.com](mailto:Anthony.Barnett@EAengineers.com)
- 2015, Cody, WY, electric, 4,115 connections. Fee: \$17,716. See listing above.
- 2014, Mountain View, WY, water and sewer, 600 connections. Fee: \$10,048. Penny Robbins, Clerk-Treasurer, (307) 782-3100, [mtnviewpenny@yahoo.com](mailto:mtnviewpenny@yahoo.com)
- 2014, Powell, WY, water and sewer, 2,000 connections. Fee: \$9,807. See listing above.

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**Projects Outside of the RATES Programs (From 2014 to-date)**

- Hillsboro, MO, water, sewer, 1,200 connections. (This engagement follows analyses in 2006 and 2011.) Fee: \$14,675. Jesse Wallis, City Administrator/City Clerk, (636) 797-3334, [administrator@hillsboromo.org](mailto:administrator@hillsboromo.org)
- Fort Mojave Tribal Utilities Authority, Mohave Valley, AZ, water, 1,500 connections. (This engagement follows 2011 analyses for the Authority.) Fee: \$10,039. Jan Christopher, Accounting Manager, (928) 768-2200, [jchristopher@FMTUA.com](mailto:jchristopher@FMTUA.com)
- East Central Missouri Water and Sewer Authority (ECM). ECM is owned by Public Water Supply District #2, St. Charles County, MO. (This is a follow-on project to a 2017 analysis for PWS #2.) 2,002 sewer connections. Fee: \$7,798. Kevin Dunn, General Manager, (636) 561-3737, [kdunn@waterdistrict2.com](mailto:kdunn@waterdistrict2.com)
- Polson, MT (continued engagement from 2014 project), stormwater, 2,235 connections. Fee: Paid with prior project. Cindy Dooley, Finance Officer, (406) 883-8204, [finance@cityofpolson.com](mailto:finance@cityofpolson.com)
- 2019, Ava, MO, water and sewer, 1,550 connections. (This was the third round of water analyses and the first sewer rate analysis for Ava.) Fee: \$14,124. Peggy Porter, Administration Director/Treasurer, (417) 683-5516, [pporter@avamissouri.org](mailto:pporter@avamissouri.org)
- 2019, Kimberling City, MO, sewer, 1,435 connections. (This engagement follows an analysis in 2010.) Fee: \$8,732. Jerry Harman, City Administrator, (417) 739-4903, [administrator@ckmo.com](mailto:administrator@ckmo.com)
- 2018, De Soto, MO, water and sewer, 6,400 connections. Analysis to provide rate basis for comparison of two options: retain ownership of utilities or sell to private utilities firm. Fee: \$12,203. David Dews, City Manager, (636) 585-3326, [d.dews@desotomo.com](mailto:d.dews@desotomo.com)
- 2018, Jefferson County, MO Public Water District #6, water, 3,000 connections. Fee: \$6,593. Tom Ward, Manager, (636) 671-4096, [manager@pwsd6.org](mailto:manager@pwsd6.org)
- 2018, Higginsville, MO, water, 2,300 connections. Fee: \$9,148. Mark Epperson, Utility Director, [utilitydirector@ctcis.net](mailto:utilitydirector@ctcis.net) and Jeanette Bobson, City Administrator, [cityadm@ctcis.net](mailto:cityadm@ctcis.net), (660) 584-2106
- 2018, Jefferson County, MO Public Sewer District, water, sewer, 2,500 connections with phenomenal growth. District has multiple service areas (rate zones) so project included 7 rate analyses. Fee: \$41,997. Douglas S. Bjornstad, P.E., District Manager, (636) 797-9900, [dbjornstad@jeffcopsd.org](mailto:dbjornstad@jeffcopsd.org)
- 2017, Terrace Water Company, Colton, CA, water, 600 connections. Fee: \$5,443. Abby Flores, Treasurer, (909) 725-4128, [abbyhflores@hotmail.com](mailto:abbyhflores@hotmail.com)
- 2017, Public Water Supply District #2, St. Charles County, MO (re-engagement), 38,700 water and 11,100 sewer connections. Analysis of water and sewer system development (connection) fees. Fee: \$3,990. Ron Smith, P.E., General Manager, (636) 561-3737, [rsmith@alliancewater.com](mailto:rsmith@alliancewater.com)
- 2017, Public Water Supply District #2 and East Central Missouri (ECM) Water and Sewer Authority, St. Charles County, MO, 11,100 sewer connections (re-engagement). Analysis of rate effects of reorganization options for ECM. Fee: hourly, totaled \$6,781. Ron Smith, P.E., General Manager, (636) 561-3737, [rsmith@alliancewater.com](mailto:rsmith@alliancewater.com)

- 2017, Cedaredge, CO, water, sewer, 1,333 connections. Fee: \$16,219. Kathleen Ann Sickles, Town Administrator, (970) 856-3123, Ext 113, [manager@cedaredgecolorado.com](mailto:manager@cedaredgecolorado.com)
- 2016, Pleasant Valley, MO, sewer, 1,100 connections. Fee: \$5,582. Georgia Fox, City Clerk, (816) 883-4698, [gfox@pleasantvalleymo.org](mailto:gfox@pleasantvalleymo.org)
- 2016, Peculiar, MO, sewer tap-on fees only, 1,800 connections. Fee: Hourly, not to exceed \$5,111. Carl Brooks, City Engineer, (816) 779-2228, [cbrooks@cityofpeculiar.com](mailto:cbrooks@cityofpeculiar.com)
- 2015, St. Joseph, MN, water, sewer, 1,650 connections. Fee: \$14,690. (This was a re-engagement by this finance director in a new city.) Lori Bartlett, Finance Director, (320) 363-7201, [lbartlett@cityofstjoseph.com](mailto:lbartlett@cityofstjoseph.com)
- 2015, Crystal City, MO, water, sewer, 1,900 connections. Fee: \$12,664. (This was a re-engagement by this city administrator in a new city.) Jason Eisenbeis, MBA, City Administrator, (636) 937-4614, [j.eisenbeis@crystalcitymo.org](mailto:j.eisenbeis@crystalcitymo.org)
- 2015, Western Heights Water Company, Yucaipa, CA, water, 2,450 connections. Fee: \$5,729. Bill Brown, Manager, (909) 790-1901, [w.brown@westernheightswater.org](mailto:w.brown@westernheightswater.org)
- 2015, Kirksville, MO, water, 6,844 connections. Fee: \$8,947. Len Kollars, Deputy Public Works Director, (660) 627-1272, [lkollars@kirksvillecity.com](mailto:lkollars@kirksvillecity.com)
- 2015, Phillips Lytle, LLC, Buffalo, NY, sewer rate expert opinion for a lawsuit their client brought against a sewer district. Fee: \$1,968. Paul Morrison-Taylor, Attorney-at-law, (716) 847-5406
- 2015, Cole County, MO PWSD #4, water, 1,200 connections. Fee: \$5,898. Will Humphrey, Manager, (573) 395-4578
- 2015, Village of North Adams, MI, sewer, 120 connections. Fee: \$5,810. Cary Addleman, Board Member, (517) 287-9045, [caddleman@comcast.net](mailto:caddleman@comcast.net)
- 2015, Rock Valley Rural Water District, Rock Valley, IA, water, 830 connections. Fee: \$7,010. Garvin Buyert, Manager, (804) 861-0998, [gbuyert@premieronline.net](mailto:gbuyert@premieronline.net)
- 2014, Anaconda-Deer Lodge County, MT, sewer, 3,000 connections. Fee: \$8,674. Ed Janney, P.E., DOWL HKM, (406) 723-8213, [ejanney@dowlhkm.com](mailto:ejanney@dowlhkm.com)
- 2014, Wurtsboro, NY, water, 100 connections. Fee: \$3,946. Monika Roosa, Village Clerk, (845) 986-7737, [villageofwurtsboro@gmail.com](mailto:villageofwurtsboro@gmail.com)
- 2014, Public Water Supply District #2, St. Charles County, MO, 36,100 water connections, 11,100 sewer connections in 3 service areas. Fee: \$27,760. Tim Geraghty, P.E., General Manager, (636) 561-3737, [tgeraghty@alliancewater.com](mailto:tgeraghty@alliancewater.com)
- 2014, Polson, MT, water and sewer completed in 2014, stormwater deferred – see above, 2,235 connections. Fee: \$15,027. (These analyses are in follow up to analyses done five years ago.) Cindy Dooley, Finance Officer, (406) 883-8204, [finance@cityofpolson.com](mailto:finance@cityofpolson.com)

Carl, I would like to thank you for your assistance in resolving our conflict with the City of King (Brookcliff's supplier) over water and sewer rates. Your detailed report helped us make our case.

Mike Cashion  
MRC Homes, Inc. (Brookcliff)

Note: The City settled a lawsuit in a sealed agreement following submission of GGR's analysis report.

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**Workshop and Event References**, from 2014 to-date (for full contact information, see previous listings)

**Scheduled Events:**

- None at this time

**Completed Events:**

- April 18 and 19, 2019, rate setting, R&R and CIP sessions, Wyoming Association of Rural Water Systems (WARWS) annual conference
- April 8-10, 2019, rate setting, R&R and CIP planning sessions, New Mexico Rural Water Association (NMRWA) annual conference
- March 26 and 27, 2019, rate setting, R&R and CIP sessions, Kansas Rural Water Association (KRWA) annual conference
- February 11, 2019, rate setting session, Colorado Rural Water Association (CRWA) annual conference
- February 13 and 14, 2019, rate setting sessions, North Dakota Rural Water Systems Association (NDRWSA) annual conference
- April 17 and 18, 2018, half-day rate setting workshop and sessions on equipment repair and replacement scheduling and capital improvements planning, WARWS annual conference
- March 27 & 28, 2018, pre-conference rate setting workshop and a conference session on system development fees, KRWA annual conference
- April 19 and 20, 2017, plenary session and rate setting sessions, WARWS annual conference
- April 26, 2017, rate setting sessions, Virginia Rural Water Association (VRWA) annual conference
- February 16, 2017, rate setting session, CRWA annual conference
- October 13, 2016, rate setting workshop for CRWA, Fort Morgan, CO
- September 8-9, 2016, rate setting sessions at Wyoming Association of Municipal Clerks and Treasurers annual institute and conference, Douglas, WY, Kathy A. Lenz, Clerk Treasurer, City of Sundance, WY, (307) 283-3451, [klenz@rangeweb.net](mailto:klenz@rangeweb.net)
- March 29-31, 2016, pre-conference workshop on rate setting and a conference session on tap fee calculation at KRWA annual conference
- November 4-5, 2015, rate setting sessions, WARWS Fall conference
- April 23, 2015, sessions on repair and replacement scheduling, calculation of meter size-based tap fees and capacity surcharges and a session called, "Stump the Rate Analyst" at WARWS annual conference

Carl, one of the things that I have learned from working with Native Americans is that if you want people to remember a concept, tell them a story. You do that intuitively and it is only one of the many things I like about your teaching style.

–Kathy Weinsaft,  
WARWS Training Specialist

While Carl has always been an expert on setting water rates, he has not always been an expert on small systems and practical rural politics. That said, over the years I've seen Carl study and educate himself in the ways of the "rural" system. Today, he not only understands the "numbers" of the rate setting process, but the practical aspect of selling the "numbers" to local decision-makers AND the public. Whether your system is large or small, technically advanced or barely in the 21<sup>st</sup> Century, there's none better in the business of rate setting than Carl Brown.

–John Hoagland, Executive Director (Retired 2017)  
Missouri Rural Water Association

- April 13 and 14, 2015, moderated rate setting roundtable discussion and rate setting training session at VRWA annual conference
- March 24, 2015, moderated two rate setting issues sessions at KRWA annual conference
- March 3, 2015, user rates and asset management sessions for Missouri Rural Water Association annual conference, Randy Norden, Executive Director, (573) 657-5533, [rnorden@moruralwater.org](mailto:rnorden@moruralwater.org).
- September 26, 2014, moderated rate setting roundtable discussion at WARWS Fall conference
- April 22-24, 2014, moderated rate setting roundtable discussion at WARWS annual conference
- March 18 & 19, 2014, rate setting pre-conference workshop and equipment replacement scheduling session at Michigan Rural Water Association annual conference, Tim Neumann, Executive Director, (616) 401-5436
- September 17-19, 2014, rate setting workshops for KRWA in Lawrence, Burlington and Hutchinson, KS

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### Publications and Resource Development

Mr. Brown writes guidance and software programs. All free items are available at <https://gettinggreatrates.com/>, under the “Freebies” link. (The rate setting book is a free download, but it can be purchased in hard copy by calling us.) Example resources:

- “How to Get Great Rates” – a book on rate setting for community and system leaders, second printing August, 2010.
- “Rate Setting Issues Guide” – a companion to How to Get Great Rates, first printing November, 2018; latest update January, 2019.
- “Ratepayer’s Survival Guide” – a guide for ratepayers (and systems) that shows what they can do to foster fair and adequate utility rates.
- “Rate Analyst Guide” – a guide to show utilities why, when and how to solicit and select rate analysts.
- “Replacement Scheduler©” – a spreadsheet for scheduling equipment repairs and replacements that calculates the annual annuity needed to pay for them.
- “CIP Scheduler©” – a spreadsheet for scheduling capital improvements, how they will be paid for (loans, grants, etc.) and the annual cash needed to fund the program.

