

## Qualifications and References

Last update: December 11, 2024

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 and broaden services of its forerunner, Carl Brown Consulting, LLC, formed in 2005. GGR operates nationally from a single office in Jefferson City, Missouri. Our NAICS Code is 541618, and is described as, "utilities management consulting services."

### Mr. Brown's Credentials

**Carl Brown** serves as president of GGR.

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 1993, Mr. Brown coordinated water and sewer loans and grants with the Water Pollution Control Program of the Missouri Department of Natural Resources (MDNR). In that capacity he served as the user charge rate structure compliance officer for the Clean Water State Revolving Fund (CWSRF) loan program. He developed the pre-cursor to the rate model that is now called, "Rate Assist." This program became the State's template for compliant CWSRF rates.

From 1993 through 2005, Mr. Brown headed the Local Government Assistance Unit in the Technical Assistance Program of MDNR. He developed the "Show-me Ratemaker" program, a do-it-yourself rate calculation spreadsheet. Mr. Brown's unit helped cities and other utility providers solve technical and regulatory compliance problems, with Mr. Brown focusing on financial and rates issues.

In late 2005, Mr. Brown left State employment and launched his water and sewer rate analysis practice. In 2007, he added electric and solid waste rate analyses. In 2013, he added stormwater rate and fee analysis. In 2020, he added fire suppression service rate analysis.

**Mr. Brown has completed 393 rate analyses as of the date above.** He develops rate analysis and related software applications and guidance materials. That includes the book, "How to Get Great Rates," the "Rate Setting Issues Guide," the "Rate Setting Best Practices Guide," do-it-yourself 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/>. All are free downloads.



Presenting to 300-1,000 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. Mr. Brown has trained several rural water associations' staff in how to do basic rate calculations and licensed to them the "Basic Rate Calculations Worksheet" for that purpose.

### **Firm Revenues**

All firm revenues come from doing rate analyses; helping clients adjust user charge rates, fees, and policies; helping wholesale water buyers and sellers arrive at appropriate wholesale rates and avoid or resolve disagreements; creating rate and fee calculation applications; and conducting rate setting workshops and training. Everything we do is related to rate setting.

### **Example Rate Analysis Reports**

A 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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### **Our Client List**

The following is not a "reference list" in the usual sense. I did not ask each client listed if they liked our work and if they would like to be a reference (give us a good review). Instead, I have listed every rate analysis client for the past four-plus years, back to 2020. My guarantee on every project is that the client will be satisfied with our work, or they do not have to pay us. To-date, all have paid. All projects have been completed on schedule or promptly after clients produced all needed data (clients sometimes gather data slowly and delay project completion). As to fees, nearly all projects are done on a lump-sum fee basis, so none has gone over budget. Only those where a client asked for hourly work outside of the service package descriptions (rare) did a project exceed the lump sum fee packages.

Our client list is presented in two parts; those that came through the "RATES" Programs, listed next; and those that were not covered by a "RATES" Program.

### **The "RATES" Programs**

GGR was chosen by eight rural water associations to serve as the analyst for their "RATES" Programs. *Rate Analysis and Training for Environmental Systems* is a supervised approach to assuredly get great rate analyses at a discount to association member systems. Visit <https://gettinggreatrates.com/> to learn more about the program and its results. As you do your reference checking, you may want to contact the program contacts in those rural water associations first. They have seen my work more often than past clients. They know me quite well. Some have known and worked with me for 25+ years. Other analysts could apply to participate in the RATES Programs. To-date, GGR is the only analyst authorized by the associations to provide services through their programs.

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**Arizona RATES Program**, initiated 1/31/2023, Rural Water Association of Arizona (RWAAZ) – Contact is changing soon

- Gila Bend, AZ, water, sewer, 613 connections. Accepted 2/28/2023. Fee: \$14,384. Kathy Valenzuela, Town Manager, (928) 683-2255, [kvalenzuela@gilabendaz.org](mailto:kvalenzuela@gilabendaz.org)
- Colorado River Indian Tribes (CRIT), Parker, AZ, water, sanitation, 1,378 connections/customers. Accepted 4/25/2023, completed 6/27/2024. Fee: \$16,420. Chris Duharte, Solid Waste Supervisor, (760) 983-8607, [c.duartedustin@crit-nsn.gov](mailto:c.duartedustin@crit-nsn.gov)

- Camp Verde, AZ, water (system development fee analysis only), 2,028 connections/customers. Accepted 11/14/2023, completed 3/20/2024. Fee: \$6,475. Jeff Low, Director of Utilities, (928) 554-0825, [jeff.low@campverde.az.gov](mailto:jeff.low@campverde.az.gov)

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**Colorado RATES Program**, initiated in 2017, Colorado Rural Water Association (CRWA) – Merci Nadon, (719) 545-6748, [mnadon@crwa.net](mailto:mnadon@crwa.net), Membership Services; Claude Strait, Executive Director, (719) 225-7338, [cstrait@crwa.net](mailto:cstrait@crwa.net)

- Lake Durango Water Authority, Durango, CO, water, 1,279 connections. Accepted 2/29/2024, the Authority ended the project 9/27/2024 because it decided a different sort of analysis would serve it better. Fee: \$4,638. Matt Nesbitt, General Manager, (970) 247-4062, [ldwamanager@gmail.com](mailto:ldwamanager@gmail.com)
- Hermosa Sanitation District, Durango, CO, sewer, 1,500 connections. Accepted 5/15/2023, completed 10/12/2023. Fee: \$8,231. Steve Janes, Plant Manager, (970) 759-0185, [hsdsteve96@gmail.com](mailto:hsdsteve96@gmail.com)
- Cedaredge, CO, water, sewer, 1,530 connections. Accepted 11/18/2022, completed 8/3/2023. Fee: \$15,967. Kami Collins, Town Administrator, (970) 856-3123, [kcollins@cedaredgecolorado.com](mailto:kcollins@cedaredgecolorado.com)
- 2022, Divide Water Providers, Inc., Divide, CO, water, 120 connections. Fee: \$5,828. Bryan Johnson, Board Member, (719) 687-6011, ext. 23, [bryan@pkenterprisesinc.com](mailto:bryan@pkenterprisesinc.com)
- 2020, 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)

By e-mail

Your report is very comprehensive and well written, and I appreciate the effort you put into the analyses. I've read it a couple of times and discover new information at each pass. Thank you.

–Richard Udd, Mayor  
Town of Cedaredge, Colorado

By e-mail:

Thank you, Carl, for your expertise!

–Tammera “Tammy” Francis  
Finance Director/HR Benefits Manager  
Town of Cedaredge, Colorado

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**Kansas RATES Program**, initiated in 2012, Kansas Rural Water Association (KRWA) – (785) 336-3760, Elmer Ronnebaum, General Manager, [krwa@krwa.net](mailto:krwa@krwa.net); Daryn Martin, Assistant General Manager, (316) 621-0314, [dmartin@krwa.net](mailto:dmartin@krwa.net)

- Ellsworth, KS (re-engagement after three previous projects), 1,100 water and sewer connections. Accepted 9/25/2024. Fee: \$18,192. Dustin Stambaugh, City Administrator, (785) 531-2545, [dstambaugh@ellsworthks.net](mailto:dstambaugh@ellsworthks.net).
- Marysville, KS, sewer and water, 1,000 connections. Accepted 12/28/2023. Fee: \$14,414. Jeff Peterson, Interim City Administrator, (785) 562-5331, [cityadm@bluevalley.net](mailto:cityadm@bluevalley.net).
- Arkansas City, KS, water, 4,950 connections. Accepted 7/11/2023, completed 8/12/2024. Fee: \$11,089. Randy Frazier, City Manager, (620) 441-4414, [rfrazier@arkansascityks.gov](mailto:rfrazier@arkansascityks.gov).

By e-mail:

...Carl, you seem to have unending capacity to "get things done". I am impressed.

–Elmer Ronnebaum, General Manager  
Kansas Rural Water Association

- Public Wholesale Water Supply District #25, Lawrence, KS, 2 water connections (water districts). Accepted 2/23/2023, completed 5/12/2023. Fee: \$6,874. Ron Wyatt, Lead Water Plant Operator, (785) 551-0026, [ron@pw25.org](mailto:ron@pw25.org).
- Butler Co, KS, RWD #5, 2,199 water connections. Accepted 2/2/2023, completed 4/15/2023. Fee: \$7,410. Terry Brown, District Manager, (316) 461-9427, [terrybrown@bucorwd5.com](mailto:terrybrown@bucorwd5.com).
- Douglas Co, KS, RWD #6, 254 water connections. Accepted 9/30/2021, completed 7/24/2022. Fee: \$6,764. Janette Funk, Clerk, (785) 318-0070, [rwdsix@gmail.com](mailto:rwdsix@gmail.com).
- 2022, Ellsworth, KS (re-engagement for full rate analyses after 2015 and 2019 projects), 1,100 water and sewer connections. Fee: \$14,545. Rusty Varnado, City Administrator, (785) 432-2800, [rvarnado@ellsworthks.net](mailto:rvarnado@ellsworthks.net).
- 2021, Kechi, KS, 670 water and sewer connections. Fee: \$12,794. Kamme Sroufe, City Administrator, (316) 744-3595, [ksroufe@kechiks.gov](mailto:ksroufe@kechiks.gov)
- 2020, Black & Veatch Corporation (engineering consultancy) to update water rate analysis done for Bonner Springs, KS to cover cost of new water treatment plant being planned, 2,815 water connections. Fee: \$2,400. James Winger, P.E., Project Manager, (913) 458-3484, [WingerJG@bv.com](mailto:WingerJG@bv.com)
- 2020, Bonner Springs, KS (re-engagement following 2008 and 2017 analyses due to recent changed conditions), 2,815 water, sewer and stormwater connections. Fee: \$21,173. Tillie LaPlante, Finance Director, (913) 667-1745, [Tilliel@bonnersprings.org](mailto:Tilliel@bonnersprings.org) and Frank Abart, Public Works Director, (913) 441-1961, [fabart@bonnersprings.org](mailto:fabart@bonnersprings.org)
- 2020, Council Grove, KS (re-engagement following 2016 water rate analysis), 1,158 water and sewer connections. Fee: \$11,224. Nick Jones, City Administrator, [citycg@tctelco.net](mailto:citycg@tctelco.net) and Derrick Craige, Water Superintendent, [watercg@tctelco.net](mailto:watercg@tctelco.net), (620) 767-5321

*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

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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)

- Doña Ana Mutual Domestic Water Consumers Association, Doña Ana, NM, (re-engagement following 2016 project), 6,229 water and 1,500 sewer connections. Accepted 12/19/2022, completed 7/15/2024. Fee: \$17,069. Jennifer Horton, Executive Director, (575) 526-3491, [jennifer@dawater.org](mailto:jennifer@dawater.org)
- 2022, Ranchos de Placitas Sanitary District, Placitas, NM, (re-engagement following 2014 project), 91 water connections. Fee: \$6,889. Jeffrey Ollendorf, Board Member, (860) 309-6384, [jeffreyollendorf@gmail.com](mailto:jeffreyollendorf@gmail.com)

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**Nevada RATES Program**, initiated 10/28/2022, Nevada Rural Water Association (NVRWA) – Kevin Baughman, Executive Director, (775) 841-4222, [kevinb@nvrwa.org](mailto:kevinb@nvrwa.org), and Max Sosa, (775) 781-8353, [maxs@NVRWA.ORG](mailto:maxs@NVRWA.ORG)

**Projects:** No rate analyses – yet.

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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) – (540) 261-7178, Rebecca Batis, Office Assistant, [email@vrwa.org](mailto:email@vrwa.org), and Mike Ritchie, Executive Director, [mritchie@vrwa.org](mailto:mritchie@vrwa.org)

- Dublin, VA, 4,812 water and sewer connections. Accepted 11/22/2023, completed 10/17/2024. Fee: \$12,771. Tye Kirkner, Town Manager, (540) 674-4798, [tkirkner@dublintown.org](mailto:tkirkner@dublintown.org).
- King William County, King William, VA, 780 water connections. Accepted 8/21/2023, completed 3/20/2024. Fee: 8,837. Josh Sluder, Director of Utilities, (804) 769-4962, [josh.sluder@kwc.gov](mailto:josh.sluder@kwc.gov).
- Waynesboro, VA, by subcontract to Thompson & Litton engineers, 8,900 water and sewer connections. Accepted 7/1/2021, completed 3/18/2024. Fee: \$17,832. Michael Jeffries, PE, Senior Project Manager, (540) 633-1897, [mjeffries@t-l.com](mailto:mjeffries@t-l.com); James Powers, Assistant City Engineer, (540) 942-6627, [PowersJH@ci.waynesboro.va.us](mailto:PowersJH@ci.waynesboro.va.us)
- Powhatan County Public Works, Powhatan, VA, 121 water and 236 sewer connections. Accepted 1/4/2023, completed 1/29/2024. Fee: \$13,969. Johnny Melis, Public Works Director, [jmelis@powhatanva.gov](mailto:jmelis@powhatanva.gov), (804) 598-5764
- Richlands, VA, 2,550 water and sewer connections. Accepted 8/1/2023, completed 8/18/2023. This was an update of the 2020 rate analyses because CIP costs anticipated back then came in much higher this year. Fee: hourly, \$2,397. (New contact) Ronnie Campbell, Director of Finance, (276) 964-2563, [rcampbell@richlands-va.gov](mailto:rcampbell@richlands-va.gov).
- Rocky Mount, VA, 3,000 water and sewer connections. Accepted 1/19/2023, completed 5/16/2023. Fee: \$12,676. Vincent K. Copenhaver, CPA, Director of Finance, (540) 483-5243, [vcopenhaver@rockymountva.org](mailto:vcopenhaver@rockymountva.org)
- 2022, Chincoteague, VA, 3,556 water connections. Fee: \$4,076. Harvey Spurlock, Public Works Director, [harvey@chincoteague-va.gov](mailto:harvey@chincoteague-va.gov), (757) 336-3366

*By e-mail response from the Finance Director after sending him the Rocky Mount, VA final rate analysis report:*

Thanks Carl,  
It has certainly been a pleasure to work with you during the past several months! I really appreciate your years of experience with these types of studies and your expertise in the arena of utility rates. Please do not hesitate to use our locality as a reference for any future localities or utility systems that may require this type of analysis.

Thanks again!  
Vincent



- 2020, Dinwiddie County Water Authority, North Dinwiddie, VA (re-engagement following 2015 rate analyses), 3,200 water and sewer connections. Fee: \$18,168. Brandon Luebbers, Office Manager, (804) 861-0998, [bluebbers@dcwa.org](mailto:bluebbers@dcwa.org)
- 2020, Richlands, VA, 2,550 water and sewer connections, several major wholesale customers. Fee: \$16,465. Timothy Taylor, Utilities Director, (276) 701-2885, [ttaylor@richlands-va.gov](mailto:ttaylor@richlands-va.gov), and Adrienne Cordle, Director of Finance, (276) 964-2566, [acordle@richlands-va.gov](mailto:acordle@richlands-va.gov)
- 2020, Prince George County, VA (re-engagement after 2017 analysis due to changed conditions), 3,200 water and sewer connections. Fee: \$16,654. Frank Haltom, P.E., (new) Director of Engineering and Utilities, (804) 722-8688, [FHaltom@princegeorgecountyva.gov](mailto:FHaltom@princegeorgecountyva.gov)

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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)

- Sundance, WY, 874 water, sewer connections. Accepted 9/13/2024. Fee: \$13,784. Theresa Curren, Clerk Treasurer, (307) 283-3451, [clerk@sundance.city](mailto:clerk@sundance.city)
- Greybull, WY, 1,200 water, sewer connections. Accepted 8/13/2024, completed 11/20/2024. Fee: \$14,361. Carrie Hunt, Town Administrator, (307) 765-9431, [admin@greybullwy.gov](mailto:admin@greybullwy.gov)
- Newcastle, WY, 1,572 water, sewer and sanitation connections/customers. Accepted 12/11/2023. Fee: \$20,445. Stacy Haggerty, Clerk/Treasurer, (307) 746-3535, [treasurer@cityofnewcastle.org](mailto:treasurer@cityofnewcastle.org); Greg Stumpff, Public Works Supervisor, (307) 746-6208, [Public.works@cityofnewcastle.org](mailto:Public.works@cityofnewcastle.org)
- Ranchester, WY, 463 water and sewer connections. Accepted: 2/1/2023, completed 3/21/2023. Fee: \$15,748. Will Newbold, Project Engineer, (307) 655-2283, [ranengineer@ranchesterwy.gov](mailto:ranengineer@ranchesterwy.gov)
- Northwest Rural Water District, Cody, WY, 3,253 water connections. Accepted 3/28/2023, completed 1/9/2024. Fee: \$10,543. Tony Rutherford, District Manager, (307) 527-4426, [tony@nrwdcodywy.com](mailto:tony@nrwdcodywy.com)
- 2022, Rawlins, WY, 3,662 water connections. Fee: \$10,237. The City's collection system for its primary water source (springs) failed. This analysis supports replacement of that system. Shawn Metcalf, City Manager, (307) 328-4500, [smetcalf@rawlinswy.gov](mailto:smetcalf@rawlinswy.gov) and Austin Gilbert, P.E., City Engineer, (709) 722-4822, [agilbert@rawlinswy.gov](mailto:agilbert@rawlinswy.gov)
- 2022, Byron, WY, 224 water and sewer connections. Fee: \$13,781. Misty Turnupseed, Clerk/Treasurer, (307) 548-7490, [clerk.treasurer@byronwyoming.org](mailto:clerk.treasurer@byronwyoming.org)
- 2022, Mountain View, WY (re-engagement after 2014 analyses), 700 water and sewer connections. Fee: \$12,218. Penny Robbins, Clerk/Treasurer, (307) 782-3100, [admin@mtvwvy.com](mailto:admin@mtvwvy.com)

*Said in an e-mail from this board member of Skyline Improvement & Service District to Mark Pepper, Executive Director of the Wyoming Association of Rural Water Systems:*

Hi Mark-  
I'm Jim Lewis, Skyline ISD, and I know that Kathy, and you, recommended that we engage Carl Brown for a Water Rate Analysis, which we did earlier this summer. I've been working with Carl these past couple of months and we're almost to the final, final, report. His approach and methodology is breathtakingly thorough and provides us with a road map on how we should fund our needed capital improvements and associated future debt service & reserve build-up over the next 10 years. I wish we had become members of the Association much earlier.  
Sincerely,  
Jim Lewis

- 2022, Skyline Ranch Improvement & Service District, Jackson, WY, 91 water connections. Fee: \$7,342. Jim Lewis [jamesl5546@gmail.com](mailto:jamesl5546@gmail.com), Treasurer, (307) 413-0829.
- 2020, 3 Creek, a subdivision a few miles out of Jackson, WY, 142 water and sewer 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)

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### Projects Outside of the RATES Programs

- Ste. Genevieve, MO, 2,000 water and sewer connections. **Accepted 9/30/2024.** Fee: \$20,817. Happy Welch, City Administrator, (573) 883-5400, [hwelch@stegenevieve.gov](mailto:hwelch@stegenevieve.gov).
- Willard, MO, 2,000 water, sewer connections. **Accepted 2/27/2024, completed 11/21/2024.** Fee: \$21,966. Donna Stewart, Interim City Administrator, (417) 742-3033, [ca@cityofwillard.org](mailto:ca@cityofwillard.org).
- Inyokern Community Services District, Inyokern, CA, 254 water connections. **Accepted 6/14/2023. (This engagement follows a water rate analysis for the district in 2012.)** Fee: \$9,395, but the District has failed to adopt the new rates and subsequently is in arrears to other vendors by about \$60,000 as of this writing, so GGR may not collect this fee. Bonnie Minnis, Office Manager, (760) 377-4708, [manager@inyokerncsd.com](mailto:manager@inyokerncsd.com).
- Cape Girardeau, MO, 17,445 water connections. **Accepted 1/13/2023, completed 7/8/2024.** Fee: \$24,779. Casey Brunke, P.E., Assistant Public Works Director, (573) 339-6351, [cbrunke@cityofcapegirardeau.org](mailto:cbrunke@cityofcapegirardeau.org); Lisa Mills, Finance Director, (573) 339-6325, [lmills@cityofcapegirardeau.org](mailto:lmills@cityofcapegirardeau.org); Erica Bogenpohl, Local Manager, Alliance Water Resources (contract operations firm for Cape), (573) 339-6609, [ebogenpohl@alliancewater.com](mailto:ebogenpohl@alliancewater.com).
- Jefferson Co, MO Public Sewer District, Crystal City and Festus, MO, 8,500 sewer connections. **Accepted 1/6/2022, completed 3/6/2024.** The cities and District were jointly my "client." The cities were considering selling their sewer systems to the District. (Sale finalized 2/15/2024.) This analysis determined the rates and fees the District would likely assess to the now-former city customers, and it calculated payments made by the District to the cities for their systems. **(This engagement followed 2018 water and sewer rate analyses, then done separately for the District and Crystal City.)** Fee: \$23,681. Douglas Bjornstad, P. E., District Manager/Engineer, (636) 797-9900, [dbjornstad@jeffcopsd.org](mailto:dbjornstad@jeffcopsd.org).

*By e-mail*

Carl, this is very helpful! I appreciate your time and the in-depth explanations.

–Bonnie Minnis, Office Manager  
Inyokern (California) Community Services District

*(Said in response to guidance about how to use Excel powerfully and efficiently.)*

*By e-mail*

Your steady, effective presentation despite the ongoing interruptions was enormously valuable and the essential part of our efforts to get our situation out in front of our town's folk.

–Tim Carroll, Board Member  
Inyokern (California) Community Services District

*(Said following a Zoom presentation of my analysis at the District's board meeting on rates.)*

*By e-mail*

Thank you, Carl! You have been the best to work with.

–Bonnie Minnis, Office Manager  
Inyokern (California) Community Services District

- Rogersville, MO, 1,557 water and sewer connections. Accepted 3/9/2023, completed 1/25/2024. Fee: \$17,599. Chad Bybee, City Administrator, (417) 540-1486, [cbybee@rogersvillemo.org](mailto:cbybee@rogersvillemo.org).
- Old Kinderhook, Camdenton, MO, 230 water connections. Accepted 12/12/2023, completed 12/19/2023. Fee: \$660. Advised on rate setting, transfer of water system to a water district, related issues. Harvey Moseley, Advisory Committee Member, (608) 825-6827, [mosleyhs@yahoo.com](mailto:mosleyhs@yahoo.com).
- Normal, IL, 17,402 water connections, development of an industrial water rates calculation model for town staff use to set industrial rates. The town later added comprehensive water rate analysis (all rates) to the project. (This engagement follows 2007 water and sewer rate analyses for the town.) Accepted 9/1/2021, completed 5/12/2023. Fee: \$18,741. Andrew Huhn, Finance Director, (309) 454-9742, [ahuhn@normal.org](mailto:ahuhn@normal.org)
- 2021, Fort Mojave Tribal Utilities Authority, Mohave Valley, AZ, 1,500 water connections. (This engagement followed 2011 analyses for the Authority.) Fee: \$10,039. Jan Christopher, Accounting Manager, (928) 768-2200, [jchristopher@FMTUA.com](mailto:jchristopher@FMTUA.com)
- 2020, 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 PWSD #2.) Sewer, 2,002 connections. Fee: \$7,798. Kevin Dunn, General Manager, (636) 561-3737, [kdunn@waterdistrict2.com](mailto:kdunn@waterdistrict2.com)
- 2020, Hillsboro, MO, 1,200 water and sewer connections. (This engagement followed analyses in 2006 and 2011.) Fee: \$14,675. Jesse Wallis, City Administrator/City Clerk, (636) 797-3334, [administrator@hillsboromo.org](mailto:administrator@hillsboromo.org)

By e-mail

Carl, I would like to thank you for your assistance in resolving our conflict with the City of King, (North Carolina, 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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Mr. Brown provides training on rates-related issues.

## Workshop and Event References

### Scheduled Events:

- March 25, 2025, KRWA conference, session on asset management and rate setting, co-trained with Arnab Bhowmick, CEO of Aktivov Asset Management, and March 26, a session just on rate setting
- April 15, 2025, WARWS conference, session on asset management and rate setting, co-trained with Arnab Bhowmick, CEO of Aktivov Asset Management

Carl, I have known and worked with you for more decades than I suspect either of us would care to admit. You still amaze me. Thank you from the bottom of my heart. I always learn from you, and you make me a better TA provider for it.

–Kathy Weinsaft,  
WARWS Training Specialist

### Completed Events:

- May 7, 2024 (by Zoom), "Excellent Asset Management and Great Rate Setting" session, RWAAZ (Arizona) annual conference, presented with Arnab Bhowmick, Aktivov Asset Management

(Said in response to my showing Kathy how to calculate rates for a WARWS member system she was helping.)



- April 16, 2024, “Excellent Asset Management and Great Rate Setting” session, WARWS annual conference, presented with Arnab Bhowmick, Aktivov Asset Management
- March 26, 2024, KRWA conference, pre-conference session on rate setting and related issues
- **December 11, 2023 (by GoToWebinar), advanced in-service staff training for KRWA in rate calculation principles and methods, and how to use the “Basic Rate Calculations Workbook”**
- December 5, 2023 (by Zoom), “Rate Setting” session, WARWS mini-conference
- June 13, 2023, ESRI conference, session on asset management and rate setting, co-trained with Arnab Bhowmick, CEO of Aktivov Asset Management
- Full-day sessions on asset management and rate setting, co-trained with Arnab Bhowmick, CEO of Aktivov Asset Management, for the following rural water association conferences in 2023: Arizona, May 25; Wyoming, April 20; Virginia, April 17 (by Zoom); New Mexico, April 4; Kansas, March 28.
- **March 13, 2023 (by Teams), in-service staff training for RWAAZ in rate calculation principles and methods, and how to use the “Basic Rate Calculations Workbook” I created for them.**
- February 14 (by Zoom), Evergreen Rural Water Association (Washington), “Excellent Asset Management and Great Rate Setting,” presented with Arnab Bhowmick, Aktivov Asset Management
- September 20 and October 4, 2022 (by Zoom), “Excellent Asset Management and Great Rate Setting” over two sessions, VRWA on-line workshop, presented with Arnab Bhowmick, Aktivov Asset Management
- August 31, 2022 (by Zoom), “Excellent Asset Management and Great Rate Setting” session, Evergreen Rural Water Association (Washington) on-line training, presented with Arnab Bhowmick, Aktivov Asset Management
- July 20, 2022 (by Zoom), “Rate Setting” session, WARWS mini-conference at Thermopolis
- June 15, 2022, “Excellent Asset Management and Great Rate Setting” session, NMRWA annual conference, presented with Arnab Bhowmick, Aktivov Asset Management
- May 24, 2022 (by Zoom), “Asset Management and Rate Setting Partnership” session, WARWS mini-conference, presented with Arnab Bhowmick, Aktivov Asset Management
- April 20, 2022, “Excellent Asset Management and Great Rate Setting” session, WARWS annual conference, presented with Arnab Bhowmick, Aktivov Asset Management; and April 21 rate setting session presented with Kathy Weinsaft, Training Coordinator, WARWS
- March 29, 2022, “Excellent Asset Management and Great Rate Setting” pre-conference workshop, KRWA annual conference, presented with Arnab Bhowmick, Aktivov Asset Management
- **March 1, 2022 (by Zoom), in-service staff training for VRWA in rate calculation principles and methods, and how to use the “Basic Rate Calculations Workbook” I created for them.**
- February 9, 2022 (by GoToWebinar), “Excellent Asset Management and Great Rate Setting” workshop, Evergreen (Washington) Rural Water Association annual conference, presented with Arnab Bhowmick, Aktivov Asset Management

- December 14, 2021 (by Zoom), “Excellent Asset Management and Great Rate Setting” workshop, second session, WARWS, presented with Arnab Bhowmick, Aktivov Asset Management
- November 30, 2021 (by Zoom), “Excellent Asset Management and Great Rate Setting” workshop, first session, WARWS, presented with Arnab Bhowmick, Aktivov Asset Management
- *April 12, 2021 (by Zoom), in-service staff training for NMRWA in rate calculation principles and methods, how to use the “Basic Rate Calculations Workbook” I created for them and how to do repair and replacement and capital improvements planning, also using workbooks I created.*
- March 25, 2021 (by Zoom), “What Lenders Want” session, WARWS
- *March 8, 2021 (by GoToWebinar), in-service staff training for KRWA in rate calculation principles and methods, how to use the “Basic Rate Calculations Workbook” I created for them and how to do repair and replacement and capital improvements planning, also using workbooks I created*
- January 14, 2021 (by Zoom), Repair and Replacement, and capital improvements planning training, VRWA
- December 1, 2020 (by Zoom), “COVID-19 and Sustainability” and “Rate Setting” sessions, WARWS virtual mini-conference
- November 18, 2020 (by Teams), “Financial Impacts of COVID-19” session, WARWS virtual conference
- October 27, 2020 (by Zoom), “Rates in the Age of COVID” session, WARWS virtual conference
- September 10, 2020 (by Zoom), Repair and Replacement, and capital improvements planning, VRWA
- August 27, 2020 (by Teams), Asset Management for WARWS fall conference, Casper, WY
- August 11, 12, 2020 (by Zoom), Rate Setting Issues for WARWS mini conference, Evanston, WY
- July 29, 2020 (by Zoom), “Sustainability in the Time of COVID,” WARWS mini conference, Pinedale, WY
- July 28, 2020 (by GoToWebinar), Repair and Replacement, and capital improvements planning training, KRWA
- June 11 and June 18, 2020 (by Zoom), sustainable utilities for the New Jersey water association
- *June 1, 2020 (by GoToWebinar), in-service staff training on rate setting, repair and replacement scheduling and capital improvements planning for National Rural Water Association*
- May 21, 2020 (by Zoom), member workshop on rate setting for WARWS
- *May 22, 2020 (by Zoom), in-service staff training for WARWS in rate calculation principles and methods, how to use the “Basic Rate Calculations Workbook” I created for them and how to do repair and replacement and capital improvements planning, also using workbooks I created.*
- April 23 and May 7, 2020 (by Zoom), workshops on sustainable utilities for the Wyoming and New Jersey water associations

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

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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:

- “Rate Setting Best Practices Guide©” – covers rate setting dos and don’ts, myths and truths; latest update February, 2021.
- “Rate Setting Issues Guide©” – a companion to “How to Get Great Rates” book, first posted November, 2018; latest update January, 2019.
- “How to Get Great Rates©” – a book on rate setting for community and system leaders, second printing August, 2010.
- “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 Planner©” – a spreadsheet for scheduling capital improvements, how they will be paid for (loans, grants, etc.) and the annual cash needed to fund the program.
- “Basic Rate Calculation Worksheet©” – a spreadsheet for the RATES Program water associations to use to calculate simple rates for member systems. Note: This application is licensed to these associations for use by only their staff.

