IDAHO FALLS

CITY COUNCIL AGENDA

City of Idaho Falls
City Council Meeting

680 Park Avenue

Thursday

April 10, 2025

7:30 p.m.

Mayor

Rebecca Casper

City Council

Lisa Burtenshaw
Council President, Seat 2

John Radford
Council Seat 5

Jim Freeman
Council Seat 6

Michelle Ziel-Dingman
Council Seat 1

Jim Francis
Council Seat 4

Kirk Larsen
Council Seat 3

Livestream at www.idahofallsidaho.gov/429/Live-Stream

PUBLIC PARTICIPATION

Welcome to the Idaho Falls City Council Meeting.

Regularly scheduled City Council meetings are open to the general public. City Council meetings are also live-streamed and archived on the City website. Please be aware that the meeting agenda will differ from the published version if amendments to the agenda are made by the Council during the meeting.

The Council encourages public input. While a general public comment option is not required by Idaho law, the Idaho Falls City Council welcomes general public input as part of regular City Council meetings. General public comment will be allowed for up to 20 minutes. However, citizens are always welcome to contact their Council representatives via e-mail or telephone, as listed on the City website. The Council is committed to an atmosphere that promotes equal opportunity, civility, mutual respect, proper decorum and freedom from discrimination or harassment.

Those who wish to address City Council during the council meetings are encouraged to adhere to the guidelines below.

Public Comment Guidelines

Speakers are encouraged to:

- State their name and city of residence.
- Focus comments on matters within the purview of the City Council.
- Limit comments to three (3) minutes or less.
- Refrain from repeating information already presented to preserve time for others to speak. Large groups are encouraged to select one or two speakers to represent the voice of the entire group.
- Practice civility and courtesy. City leaders have the right and the responsibility to maintain order and decorum during the meeting. Time may be curtailed for those speakers whose comments are profane or disruptive in nature.
- Refrain from comments on issues involving matters currently pending before the City's Planning and Zoning Commission or other matters that require legal due process, including public hearings, City enforcement actions, and pending City personnel disciplinary matters.
- Comments that pertain to activities or performance of individual City employees should be shared directly with the City's Human Resources Director (208-612-8248), the City's Legal Department (208-612-8178) or with the Office of the Mayor (208-612-8235).

Public Hearing Guidelines

- In-person Comment. Because public hearings must follow various procedures required by law, please wait to offer your comments until comment is invited/indicated. Please address comments directly to the Council and try to limit them to three (3) minutes.
- Written Comment. The public may provide written comments via postal mail sent to City Hall or via email sent to the City Clerk at IFClerk@idahofalls.gov. Comments will be distributed to the members of the Council and become a part of the official public hearing record. Written testimony must be received no later than forty-eight (48) hours prior to the date of the hearing to ensure inclusion in the permanent City record.
- Remote Comment. When available, the public may provide live testimony remotely via the WebEx meeting platform using a phone or a computer. Those desiring public hearing access should send a valid and accurate email address to virtualattend@idahofalls.gov no later than twenty-four (24) hours prior to the date of the hearing so log-in information can be sent prior to the meeting. Please indicate which public hearing the testimony is intended for on the agenda. Please note that this remote option will not be available for all meetings.

If communication aids, services, or other physical accommodations are needed to facilitate participation or access for this meeting, please contact the City Clerk at (208) 612-8414 or the ADA Coordinator at (208) 612-8323 not less than 48 hours prior to the meeting. They will help accommodate special needs wherever possible.

City Council Meeting

Agenda

680 Park Avenue
Idaho Falls, ID 83402

Thursday, April 10, 2025 | **7:30 PM** | **City Council Chambers**

City Council Agenda:

1. Call to Order

2. Pledge of Allegiance

3. Public Comment

Please see guidelines above.

4. Consent Agenda

Any Consent Agenda item may be moved to the Regular Agenda for separate consideration if requested by a Council member. Other changes to this agenda may require the approval of a majority of Council.

A) Office of the Mayor

1) Appointments to City Boards, Committees and Commissions pursuant to Idaho Falls City Code Title 2 **25-220**

Attachments:
Golf_MollbergApplication_April10
Golf_MollbergApptMemoParks_April10
Golf_Mollbert_Memo_April10
Golf_CITY CODE TITLE 2 CH 6
WarBonnetReAppointment_April10
WB_MOMemo_Newgard_April10
WB_CITY CODE TITLE 2 CH 4

B) Municipal Services

1) Enterprise Resource Planning (ERP) software Contracts **25-168**

Attachments:
Sprypoint Master Subscription and Exhibits
Combined Strada SOW
WCG_IDAHO FALLS ERP SUPPORT SOW_v1.0

C) Public Works

1) Bid Award - Storm Improvements - Oneida Avenue at Basalt Street, Lava Street and Hill Street **25-214**

Attachments:
Storm Improvements Onedia at Basalt Map and Bid Tab

D) Idaho Falls Power

1) Idaho Falls Power Board Minutes - February 2025 **25-184**

Attachments: 2025 0212 IFP Board Meeting Minutes

2) IFP-25-11 Transformer Inventory for Idaho Falls Power - Pulse Mac, IRBY, KLLEN Group **25-186**

Attachments: Bid Tab IFP 25-11

E) Airport

1) Meeting Minutes from the Idaho Falls Regional Airport Board of Directors 28 February 2025 **25-202**

Attachments: 20282025 IDA Board of Directors Meeting Minutes DRAFT

F) City Attorney

1) Downtown Parking Memorandum of Understanding between Idaho Falls Downtown Development Corporation (IFDDC) and the City of Idaho Falls. **25-208**

Attachments: Amendment to IFDDC MOU Parking Program 3.7.2024

G) Office of the City Clerk

1) City Council Meeting Minutes **25-189**

Attachments: Council Meeting Minutes 12.19.24
Council Meeting Minutes 01.09.25
Council Meeting Minutes 01.30.25
Council Meeting Minutes 02.13.25
Council Meeting Minutes 02.27.25

2) City Council Work Session Minutes **25-200**

Attachments: Work Session Minutes 01.27.25
Work Session Minutes 02.18.25

3) City Council Meeting Minutes-2025 Budget Retreat **25-201**

Attachments: Budget Retreat Minutes 02.21.25

Action Item:

Approve, accept, or receive all items on the Consent Agenda according to the recommendations presented (or take other action deemed appropriate).

5. Regular Agenda

A) Parks & Recreation

1) Playground equipment at Willowbrook and Antares parks. **25-218**

The Parks and Recreation Department issued an RFP for new playground equipment for Willowbrook Park and Antares Park. Three proposals were received, with Big T Recreation being the most responsive to the criteria set forth in the RFP. Big T Recreation will build and install playground equipment at Willowbrook and Antares parks for $99,165.

Action Item(s):
Accept the proposal from Big T Recreation for purchase and installation of playground equipment at Willowbrook and Antares parks for $99,165 (or take other action deemed appropriate).

Attachments: Willowbrook Park - Proposal
Antares Park - Final Layout

2) 2025 Idaho Falls Zoo Proposed Fee Increases **25-222**

Notice of the April 10 public hearing to be held at 7:30 p.m. in the City Council Chambers of the City Annex Building located at 680 Park Avenue, Idaho Falls, Idaho, for the Parks and Recreation Zoo proposed fee increases was published in the Post Register twice on March 22 and March 29 of this year, 2025. The proposed Parks and Recreation fees have an April 24, 2025, effective date.

Action Item(s):
Conduct a public hearing for the revised Parks and Recreation Zoo fees as listed on the 2025 fee schedule and approve the new and revised fees (or take other action deemed appropriate).

Attachments: Proposed Zoo Fee Changes

B) Airport

1) Consideration of Resolution Approving 2025 Idaho Falls Regional Airport Master Plan **25-203**

The 2025 Idaho Falls Regional Airport Master Plan process began in July 2021. Since then, the Airport and its consultant applied a forecast of aviation demand to the existing conditions at the airport to produce this twenty-year plan. The process included four technical advisory committee meetings, four public meetings, a public comment period, numerous discussions with airport staff, and multiple presentations to City Council. The final product of the airport master plan and airport layout plan are included with this item. It has been reviewed by the Federal Aviation Administration and is now ready for formal adoption to guide the future development of the Airport.

Action Item(s):
Approve the resolution adopting the 2025 Idaho Falls Regional Airport Master Plan (or take other action deemed appropriate).
Description, Background Information & Purpose

Attachments: Resolution - 2025 Idaho Falls Regional Airport Master Plan
IDA_2025 Airport Master Plan
IDA_ALP_Sheet_Set_Final_03312025

C) Fire Department

1) International Fire Code Ordinance **25-210**

Adoption of the most current edition of the International Fire Code ensures application of the most current guidelines and aligns the current code with Community Development Services and the State of Idaho.

Action Item(s):
Approve the Ordinance amending sections 7-10-1 through 7-10-5 adopting the International Fire Code under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title or reject the Ordinance.)

Attachments: Ordinance - Title 7 Ch 10 International Fire Code 3.12.25

D) Police Department

1) Graffiti Ordinance Update **25-219**

The Council recently approved updates to the City's graffiti ordinance, eliminating the language that City staff enter private property to clean private property. During that update, one reference to that language was missed in the "Exceptions to removal" section. That section will now be updated allowing an exception to the removal of graffiti if the removal would cause irreparable harm to the property. This update makes it clear the private property owner is removing the graffiti but has an exemption if the removal will cause irreparable harm to the property.

Action Item(s):
Approve the Ordinance updating City Code Title 5, Chapter 10, Section 6, under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and request that it be read by title, reject the Ordinance, or take other action deemed appropriate).

Attachments: Ordinance - Title 5 Ch 10 Sec 6 Graffiti 3.27.25

E) Public Works

1) Bid Award - Water Meter Box Installation 2025 Phase II **25-215**

On Wednesday, March 19, 2025, bids were received and opened for the Water Meter Box Installation 2025 Phase II project. The tabulation of bid results is attached. The purpose of the project is to install water meter pits within the northwest section of Idaho Falls.

Action Item(s):
Approve the plans and specifications; award to the lowest responsive, responsible bidder, JM Concrete, Inc., in the amount of $1,151,410.00; and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Attachments: Water Meter Box Phase II Map and Bid Tab

2) Negotiated Contract - Elevated Water Supply Line with JM Concrete Incorporated **25-216**

On Wednesday, February 19, 2025, a bid opening was scheduled for the Elevated Water Tower Supply Line project. No bids were received. Public Works gained Council approval at the March 20th, 2025, Council Meeting to turn to the open market to secure qualified public works contractor(s) to complete the work.

The negotiated contract to construct a water line from Well 3 to the new elevated tower with JM Concrete is now being brought forward for consideration.

Action Item(s):
Approve the plans, specifications, and negotiated contract with JM Concrete, Inc., in the amount of $470,505.00; and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Attachments: WTR-2020-35 Elevated Water Tower Supply Line Agreement

3) Cooperative Agreement and Resolution with the Idaho Transportation Department for City of Idaho Falls Lighting Upgrades **25-217**

Attached for your consideration is a Cooperative Agreement and Resolution with ITD for the City of Idaho Falls Lighting Upgrades project. The agreement stipulates that lighting design, bidding and contract administration will be completed by City forces and be reimbursed by the State.

Action Item(s):
Approve the Cooperative Agreement and Resolution with the Idaho Department of Transportation (ITD) for the City of Idaho Falls Lighting Upgrades project and authorize the Mayor and City Clerk to sign the necessary documents (or take other action deemed appropriate).

Attachments: 23247 COOP City of Idaho Falls

F) Municipal Services

1) Bid IF-25-018, 2025 Water Line Concrete and Asphalt Surface Repair for Public Works **25-207**

A total of two bids were received for this project. This purchase includes various units of curb and gutter, concrete, rebar, and plant mix to support 2025 water line surface repair projects for the Public Works, Water Division. The total estimate of $776,595.00 is based on a three-year historical unit quantities for water line surface repair projects.

Action Item(s):
Accept and approve the bid received from the lowest responsive and responsible bidder, JM Concrete, for an estimated total of $776,595.00 (or take other action deemed appropriate).

Attachments: IF-25-018 Water Line Surface Repair

G) City Attorney

1) Amendment to Naming Rights Agreement with Frontier Credit Union **25-209**

On September 18, 2023, the City and Frontier Credit entered into a Naming Rights Agreement to rename the Idaho Falls Civic Center for the Performing Arts to the Frontier Center for the Performing Arts. In exchange for the right to maintain the name as the Frontier Center for a term of forty (40) years, Frontier Credit Union agreed to pay a Rights Fee to the City in the amount of $3,500,000.

On December 15, 2024, the City received bids for the lobby expansion for the Frontier Center for the Performing Arts. The low bid exceeded the amounts budgeted for the lobby expansion. The Frontier Credit Union offered to help make up the shortfall for the lobby expansion in exchange for an Amendment to the Naming Agreement.

The Amendment would extend the term of the Naming Rights Agreement for an additional ten (10) years, for a total of fifty (50) years, in exchange for an additional nine-hundred thousand dollars ($900,000) toward the Rights Fee, for a total of $4,400,000.

Action Item(s):
Approve the Amendment to the Naming Rights Agreement with Frontier Credit Union (or take other action deemed appropriate).

Attachments: Amendment to the Frontier Center Naming Rights Agreement 3.27.25

2) Ordinance Repealing the City's Daycare and Childcare Worker Licensing Regulations in Chapter 3, of Title 6, of the City Code. **25-211**

While the City has regulated daycare facilities and childcare workers for many years, the Idaho Legislature passed House Bill 243, preempting local regulation of daycare facilities and their workers. Under this new state law, the City of Idaho Falls no longer has the authority to regulate daycare and daycare facilities beyond July 1, 2025. After that date, the Idaho Department of Health and Welfare will establish and oversee all daycare licensing requirements.

Discontinuing the City's daycare licensing now will accelerate the transition to Department of Health and Welfare. Currently, if an Idaho city does not regulate a daycare facility, the facility is obligated to license with the Department. If the City discontinues daycare regulation now, it will eliminate the

possibility of a “gap” in the health and safety guarantees for daycare consumers.

Action Item(s):
Approve the Ordinance repealing the daycare and childcare worker licensing regulations found in Chapter 3, of Title 6, of the City Code under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

Attachments: Ordinance

H) Community Development Services

1) Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards, MK Simpson Center Division No. 3 **25-199**

Attached is the application for the Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards for MK Simpson Center Division No. 3. The Planning and Zoning Commission considered this item at its January 7, 2025, meeting and unanimously voted to recommend approval of the final plat to the Mayor and City Council as presented.

Action Item(s):
1. Approve the Development Agreement for the Final Plat for MK Simpson Center Division No. 3 and give authorization for the Mayor and City Clerk to sign said agreement (or take other action deemed appropriate).

2. Accept or Approve the Final Plat for MK Simpson Center Division No. 3 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat (or take other action deemed appropriate).

3. Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for MK Simpson Center Division No. 3 and give authorization for the Mayor to execute the necessary documents (or take other action deemed appropriate).

Attachments: Zoning Map
Aerial
Final Plat
PC Minutes
Staff Report
Reasoned Statement
Development Agreement

2) Legislative Hearing: Consideration of an Ordinance approving Snake River West Urban Renewal District **25-195**

Attached for consideration is the ordinance approving the Snake River West Urban Renewal District. The ordinance includes four exhibits:

1. The resolution of the Planning and Zoning Commission for the City of Idaho Falls, Idaho, validating conformity of the Urban Renewal Plan for the Yellowstone Square Urban Renewal

Project with the City of Idaho Falls' Comprehensive Plan.

2. The notice of hearing published in the Post Register.
3. The Urban Renewal Plan for the Yellowstone Square Urban Renewal Project, including all associated attachments.
4. Ordinance summary for publication.

Required notification and summary of the plan has been provided to the appropriate taxing entities. The plan included with the ordinance contains an outline of potential projects which may be completed with tax incrementing financing (TIF) funds and a financial feasibility study demonstrating that the expected tax revenues can cover the costs of the projects. Approval of the ordinance is the final step in the creation of the district, which will allow for TIF to be used to incentivize and assist redevelopment of the area. The Idaho Falls Redevelopment Agency (IFRA) Board approved the plan by resolution at its November 21, 2024, meeting. This is anticipated to be a 20-year plan, the maximum allowed by State Statute.

Action Item(s):

Approve the Ordinance approving the Snake River West Urban Renewal District under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

Attachments: Ordinance
(Exhibit 1) Resolution of the Planning Commission
(Exhibit 2) Notice Published in the Post Register
2nd Notice Published in the Post Register
(Exhibit 3) Urban Renewal Plan for the Snake River West Urban Renewal Project
(Exhibit 3) Attachment 5 - Economic Feasibility Study.pdf
(Exhibit 3) Attachment 6 - Agricultural Operation Consents.pdf
(Exhibit 3) Exhibit C - Eligibility Report.pdf
(Exhibit 3) Agricultural Operation Consent Form.pdf
(Exhibit 4) Ordinance Summary_Snake River West Plan
(Exhibit A for PC Resolution) Snake River West PC Staff Report
Opposition Letter
Opposition Letter Diagram Snake River West

3) Quasi-judicial Public Hearing-Rezone from LC, Limited Commercial to I&M, Industrial and Manufacturing, Zoning Ordinance and Reasoned Statement of Relevant Criteria and Standards for approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East. **25-197**

Attached is the application for Rezoning approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East from LC, Limited Commercial to I&M, Industrial and Manufacturing, Zoning Ordinance, and Reasoned Statement of Relevant Criteria and Standards for approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East. The Planning and Zoning Commission considered this item at its March 4, 2025, meeting and unanimously voted to

recommend approval of the zone change from LC to I&M to the Mayor and City Council as presented.

Action Item(s):
1. Approve the Ordinance Rezoning approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East from LC, Limited Commercial to I&M, Industrial and Manufacturing, under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

2. Approve the Reasoned Statement of Relevant Criteria and Standards for the Rezone from LC to I&M and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Attachments: Zoning Map
Aerial
Comp Plan Map
Staff Report
PC Minutes
Ordinance
Reasoned Statement
Neighborhood Meeting Packet

4) Quasi-judicial Public Hearing-Rezone from R1, Single Dwelling Residential to R3, Multiple Dwelling Residential, Zoning Ordinance and Reasoned Statement of Relevant Criteria and Standards for approximately 2.41 acres in Lots 4-5, Block 9, Lots 3-7, less a portion of lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No. 2, plus adjacent right-of-way. **25-198**

Attached is the application for Rezoning approximately 2.41 acres in Lots 4-5, Block 9, Lots 3-7, less a portion of lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No. 2, plus adjacent right-of-way from R1 to R3, Zoning Ordinance, and Reasoned Statement of Relevant Criteria and Standards. The Planning and Zoning Commission considered this item at its March 4, 2025, meeting and unanimously voted to recommend approval of the zone change from R1 to R3 to the Mayor and City Council as presented.

Action Item(s):
1. Approve the Ordinance Rezoning approximately 2.41 acres in Lots 4-5, Block 9, Lots 3-7, less a portion of lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No. 2, plus adjacent right-of-way from R1, Single Dwelling Residential to R3, Multiple Dwelling Residential, under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

2. Approve the Reasoned Statement of Relevant Criteria and Standards for the Rezone from R1 to R3 and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Attachments: Zoning Map
Aerial
Comp Plan Map
Staff Report
PC Minutes
Ordinance
Reasoned Statement
Neighborhood Meeting Packet

6. Announcements

7. Adjournment

Memorandum

File #: 25-220 **City Council Meeting**

FROM: Rebecca Casper
DATE: Friday, April 4, 2025
DEPARTMENT: Mayor's Office

Subject
Appointments to City Boards, Committees and Commissions pursuant to Idaho Falls City Code Title 2

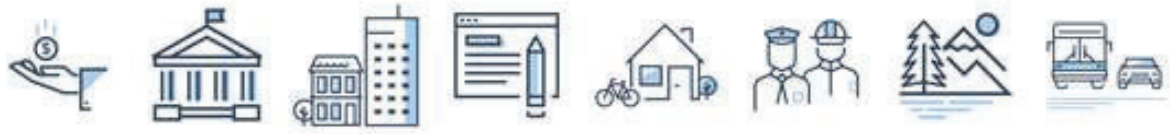
Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Give consent to the appointment of Lonnie Mollberg to the Golf Advisory Board and the reappointment of Jeff Newgard to the War Bonnet Advisory Committee pursuant to Title 2 of the Idaho Falls City Code.

Description, Background Information & Purpose

Name:	Status:	Committee, Board, Commission
Lonnie Mollberg	New Appointment	Golf Advisory Board
Jeff Newgard	Reappointment	War Bonnet Advisory Committee

Attached for your review please find the citizen application from Lonnie Mollberg for the Golf Advisory Board, along with memoranda from Parks & Recreation and Chief of Staff Margaret Wimborne, and Title 2 Chapter 6. In addition, you will find memoranda from Parks & Recreation and Chief of Staff Margaret Wimborne for the reappointment of Jeff Newgard to the War Bonnet Advisory Committee, along with a copy of Title 2 Chapter 4.

Alignment with City & Department Planning Objectives



☐ ☒ ☐ ☐ ☐ ☐ ☐ ☐

Involving citizens in governance and decision-making processes supports the highest values of the strategic plan.

Interdepartmental Coordination
The appointment process includes collaboration with Parks & Recreation and interviews with the new appointees.

Fiscal Impact
None. Activities and expenses necessary for the proper function of the City's boards, commissions and committees is accounted for within the appropriate agency or department budget.

Legal Review
N/A

City of Idaho Falls
Boards, Committees and Commissions
Citizen Application

Thank you for your willingness to serve our community. Please fill out this form and attach a résumé to this application. If you wish, you may also submit a cover letter explaining your interest in city service.

Your application will be kept on file. When there is an opening on a relevant City Board, Committee or Commission, your application will be reviewed. Return the completed form to the Mayor's office at: City of Idaho Falls Mayor's office: P.O. Box 50220, Idaho Falls, ID 83405 or mayor@idahofalls.gov.

Name:	Lonnie Mollberg	
Mailing Address:	PO Box 51486	
City, State, Zip:	Idaho Falls, ID 83405	
Email Address:	lmollb@gmail.com	
Daytime Phone:		☐ Message? ☐ Text?
Evening Phone:		☐ Message? ☐ Text?
Cell Phone:	208-360-2428	☐ Message? ■ Text?

What is your motivation for service on this/these committee(s)?

As a long time participant in IF golf, whether as playing with a group, individually or in regularily scheduted events or course sponsored tournaments, I am very aware of the influence on arranging for tee times due to the very high demand for playing time at each of the three courses

How does your background training and experience lend itself to service on this/these committee(s)?

For several years I was a member of the IGA course rating group which called for traveling throughout the region visiting courses to evaluate how and what resulted in quality maintence for the facilities and the impact from players. Also, for multiple years I have been a participant in the Upper Snake River Seniors golf outings throughout Eastern Idaho. Playing golf with individuals thoughout the region allows for interaction to learn what does, and does not work, at other courses.

Please list any relevant areas of expertise, education or training you possess that will be helpful for service.

Was a member of the Mayor's Citizen Advisory Board overseeing IF Power which provided insight into how the city of Idaho Falls bureaucracy works within agencies.

FOR OFFICE USE ONLY:	
Date received by Mayor's Office:	Date appointed:
City Division(s) application forwarded to:	Board, Committee or Commission appointed to:

	Length of term (Years)	Meeting Frequency
Mayor's Office		
☐ Sister Cities Committee	Three (3)	As Needed
Fire Department		
☐ Fire Code Appeals Board	Five (5)	Yearly/As Needed
Library		
☐ Library Board	Five (5)	Monthly/As Needed
Municipal Services		
☐ Civic Center for the Performing Arts Committee	Two (2)	As Needed
Parks and Recreation		
☑ Golf Advisory Board	Three (3)	Every Other Month
☐ Parks and Recreation Commission	Three (3)	Monthly
☐ Shade Tree Committee	Three (3)	Monthly
☐ Tautphaus Park Zoological Society	Three (3)	Quarterly
☐ War Bonnet Round Up Advisory Committee	Three (3)	As Needed
Community Development Services		
☐ Board of Adjustment	Five (5)	2nd Thursday/As Needed
☐ Building Code Board of Appeals	Three (3)	As Needed
☐ Electrical Board of Review	Two (2) & Three (3)	As Needed
☐ Historic Preservation Commission	Three (3)	1st Thursday
☐ ADA Advisory Board	Three (3)	As Needed
☐ Idaho Falls Business Assistance Corp	Staggering Terms	Quarterly/As Needed
☐ Idaho Falls Redevelopment Agency	Five (5)	3rd Thursday
☐ Mechanical Appeals Board	Three (3)	As Needed
☐ Planning Commission	Six (6)	1st Tuesday
☐ Plumbing Appeals Board	Three (3)	As Needed
Public Works		
☐ Impact Fee Advisory Committee	Three (Staggered Terms)	As Needed
Regional Committees		
☐ Bonneville Metropolitan Planning Organization		
Other		
☐ _____		

1Where not specifically required by law, City of Idaho Falls residents will be given preference. 2Four (4) members shall have professional training or experience in the disciplines of architecture, history, architectural history, urban planning, archaeology, engineering, law, or other historic preservation-related disciplines. 3All members shall be a person with a disability or have a demonstrated interest, competence or knowledge of disabilities. 4One (1) member shall be a Bonneville County resident residing within the area of city impact. Please note: Those who stand to receive a direct financial benefit from a particular position, who are involved in litigation with a relevant city department, and who are not city residents may be declared ineligible to serve on a committee. Any Information supplied may be subject to disclosure under the Idaho Public Records Law §§ 9-337 through 9-350

PARKS & RECREATION

P.J. Holm | *Director of Parks & Recreation*
Office (208) 612-8482
Fax (208) 612-8179

IDAHO FALLS
PARKS & REC

MEMORANDUM

TO: Margaret Wimborne, Chief of Staff

FROM: PJ Holm, Director, Parks and Recreation Department

DATE: March 11, 2025

RE: Parks and Recreation Department Boards, Committees and Commission Appointments and Re-Appointments

The Parks and Recreation Department would like to submit for consideration, applicant Lonnie Mollberg for appointment to the Golf Advisory Board. Lonnie would fill the seat formerly held by Randy Ellwood who retired from the board in 2024. Lonnie's term would be from appointment date this spring of 2025 to December 31, 2027

520 Memorial Drive | Idaho Falls, Idaho 83402

OFFICE OF THE MAYOR

Office (208) 612-8235
Fax (208) 612-8560

IDAHO FALLS

MEMORANDUM

TO: Rebecca Casper

FROM: Margaret Wimborne

DATE: April 4, 2025

RE: Golf Advisory Board

I recommend the appointment of Lonnie Mollberg to Idaho Falls' Golf Advisory Board pursuant to Idaho Falls City Code Title 2 Chapter 6.

Lonnie Mollberg was recommended by the Parks & Recreation Department for service on the Golf Advisory Board. I have had the opportunity to meet with Mr. Mollberg, and it is clear he has a deep love of the game, and a commitment to improving the golfing experience in Idaho Falls. I think Mr. Mollberg's expertise, as well as his focus on addressing issues and improving systems will be a real asset to the Golf Advisory Board. I wholeheartedly support his appointment.

CHAPTER 6
GOLF ADVISORY BOARD

SECTION:

2-6-1: Establishment
2-6-2: Purpose
2-6-3: Duties
2-6-4: Organization
2-6-5: Term of Office
2-6-6: Removal
2-6-7: Vacancy
2-6-8: Attendance
2-6-9: Open Meetings
2-6-10: Minutes
2-6-11: No Compensation
2-6-12: Indebtedness

2-6-1: ESTABLISHMENT.

The Golf Advisory Board of Idaho Falls ("Board") is hereby established. The Mayor, with the consent of the Council, shall appoint thirteen (13) members to the Board, as set forth below:

(A) The president of the Idaho Falls Men's Golf Association.

(B) The president of the Idaho Falls Women's Golf Association.

(C) The president of the Senior Golf Association.

(D) The president of the Junior Golf Association.

(E) The president of the Working Women's League.

(F) Six (6) at-large members, appointed without regard to their affiliation with any group or organization.

(G) A member of the Council, to serve ex-officio and without a vote.

2-6-2: PURPOSE.

The Board acts in an advisory capacity to the Director of Parks and Recreation in matters related to municipal golf courses and programs.

2-6-3: DUTIES.

The Board shall make recommendations to the Mayor and Council concerning the operation, maintenance, and conduct of the City golf courses. It also shall study existing City golf facilities and make recommendations concerning the advisability and feasibility of acquiring additional golf courses or facilities or of expanding or renovating existing facilities.

2-6-4: ORGANIZATION.

During the first meeting of each calendar year, the Board shall elect from its membership, by majority, a person to act as Chair and a person to act as Vice-Chair. The Chair and Vice-Chair shall serve until replaced or re-elected. The Chair shall preside at all meetings. If the Chair is absent or unable to act at any meeting, the Vice-Chair shall preside.

2-6-5: TERM OF OFFICE.

All Committee members, except for at- large members, shall serve as long as they continue to serve in the offices or capacities designated in this Chapter. All at-large members shall serve terms of three (3) years, except that the terms of the initial Board members may be less than three (3) years as necessary to provide for staggered terms of office. The terms of no more than two (2) at-large members shall expire in any calendar year. Terms of at-large members shall expire on December 31 of the third year of their appointment. All other appointed, voting Board members shall serve indefinite terms at the will and pleasure of the Mayor and Council. Board members may be reappointed.

2-6-6: REMOVAL.

A Board member may be removed from the Board by the Mayor and at the Chair's request, following two (2) consecutive meeting absences in a single year unexcused by the Chair or at any time by the majority vote of the Council.

2-6-7: VACANCY.

The Mayor, with the consent of the Council, shall appoint a qualified person to fill the unexpired term of any Board member in the event of a vacancy or in the event any member ceases to be qualified.

2-6-8: ATTENDANCE.

A quorum of Board members shall be present in order for purposes of conducting the business of the Board. Non-voting members present at meetings shall not be considered in determining the number required for a quorum or whether a quorum is present. (Ord. 3540, 9-14-23)

2-6-9: OPEN MEETINGS.

All meetings of the Board shall be open to the public and shall follow the requirements of the Idaho Open Meeting law.

2-6-10: MINUTES.

The Board shall keep minutes of its proceedings, including the vote of each voting member on every presented issue. The meeting minutes and other records of the Board shall be open to the public.

2-6-11: NO COMPENSATION.

Board members shall receive no compensation for their service on the Board; however, expenses for equipment and supplies necessary for the Board to conduct its business shall be allowed by the Council.

2-6-12: INDEBTEDNESS.

Nothing herein conveys or otherwise delegates authority to the Board to incur any liability, obligation, or indebtedness on behalf of the City without the express, written authorization of the Council.

PARKS & RECREATION

P.J. Holm | *Director of Parks & Recreation*
Office (208) 612-8482
Fax (208) 612-8179

IDAHO FALLS PARKS & REC

MEMORANDUM

TO: Margaret Wimborne, Chief of Staff

FROM: PJ Holm, Director, Parks and Recreation Department

DATE: February 28, 2025

RE: Parks and Recreation Department Boards, Committees and Commission Appointments and Re-Appointments

The Parks and Recreation Department would like to submit for consideration, re-appointment of Jeff Newgard to the War Bonnet Advisory Committee. Jeff Newgard would have a three-year term ending in 12-31-2027.

A request for his re-appointment was not sent previously as we thought he may be leaving the committee

520 Memorial Drive | Idaho Falls, Idaho 83402

OFFICE OF THE MAYOR

Office (208) 612-8235
Fax (208) 612-8560

IDAHO FALLS

MEMORANDUM

TO: Mayor Rebecca Casper

FROM: Margaret Wimborne

DATE: March 13, 2025

RE: War Bonnet Round Up Advisory Committee Reappointments

Jeff Newgard has been recommended for reappointment to the War Bonnet Round Up Advisory Committee. Parks & Recreation staff believe Newgard's continued service on the advisory committee would be a great benefit to the War Bonnet committee as well as the rodeo itself.

CHAPTER 4
WAR BONNET ROUND UP ADVISORY COMMITTEE

SECTION:

2-4-1: Establishment
2-4-2: Purpose
2-4-3: Duties
2-4-4: Organization
2-4-5: Terms
2-4-6: Removal
2-4-7: Vacancy
2-4-8: Attendance
2-4-9: Open Meetings
2-4-10: Minutes
2-4-11: Funding and Donations

2-4-1: ESTABLISHMENT.

The War Bonnet Roundup Rodeo Advisory Committee ("Committee") is hereby established. The Mayor, with the consent of the Council, shall appoint seven (7) voting members to the Committee. Those appointed should be individuals with a demonstrated interest, competence, or knowledge of various rodeo, western, and War Bonnet Round Up ("WBRU")-related interests. Members shall be selected without regard to political affiliation, race, color, national origin, gender, family status, sex, handicap, sexual orientation, gender identity/expression or religion. Committee members shall serve without compensation. The Mayor may appoint, with the consent of the Council, additional persons with interest, expertise, and experience to be non-voting ex-officio members of the Committee. (Ord. 3542, 9-14-23)

2-4-2: PURPOSE.

The purpose of the Committee is to advise and assist the Director of Parks and Recreation, the Mayor, and the Council in preserving, developing, planning, promoting, managing, directing, and producing Idaho's Oldest Rodeo, the WBRU and to suggest improvements to City facilities, properties, and programs related to it.

2-4-3: DUTIES.

The Committee shall have the following powers, duties, and responsibilities:

(A) Advise the Director of Parks and Recreation regarding the preservation, development, planning, promotion, management, directing, and producing of the WBRU; and

(B) Study the physical condition, maintenance, operation, viability, and use of City rodeo programs and facilities and make recommendations to the Director of Parks and Recreation concerning their improvement and efficient use; and

(C) Suggest ways to create, sustain, and enhance the cultural and economic viability of the WBRU.

(Ord. 3542, 9-14-23)

2-4-4: ORGANIZATION.

During the first meeting of each calendar year, the Committee shall elect from its membership, by majority, a person to act as Chair and a person to act as Vice-Chair. The Chair and Vice-Chair shall serve until replaced or re-elected. The Chair shall preside at all meetings. If the Chair is absent or unable to act at any meeting, the Vice-Chair shall preside.

2-4-5: TERM OF OFFICE.

Each Committee member shall be appointed to serve a term of three (3) years, except that the terms of the initial Board members may be less than three years as necessary to provide for staggered terms of office. Terms of no more than three (3) members shall expire in any calendar year. Committee members may be reappointed.

2-4-6: REMOVAL.

A Committee member may be removed from the Committee by the Mayor and at the Chair's request, following two (2) consecutive meeting absences unexcused by the Chair or at any time by the majority vote of the Council.

2-4-7: VACANCY.

The Mayor, with the consent of the Council, shall appoint a qualified member to fill any unexpired term of a Committee member in the event of a vacancy.

2-4-8: ATTENDANCE.

A quorum of Committee members shall be present in order for purposes of conducting the business of the Committee. Non-voting members present at meetings shall not be considered in determining the number required for a quorum or whether a quorum is present. (Ord. 3540, 9-14-23)

2-4-9: OPEN MEETINGS.

The Committee shall meet as often as deemed necessary by the Director of Parks and Recreation. All meetings of the Committee shall be open to the public and shall follow the requirements of

the Idaho Open Meetings Law. The Director of Parks and Recreation shall keep minutes and other appropriate records pursuant to the Idaho Code.

2-4-10: MINUTES.

The Committee shall keep minutes of its proceedings, including the vote of each member on every presented issue. The meeting minutes and other records of the Committee shall be open to the public. The Committee shall provide an annual report, as approved by the Director of Parks and Recreation, to the Council in within sixty (60) days of the conclusion of the annual WBRU, which report shall include activities and accomplishments, a financial report, and any recommendations for subsequent WBRUs. The Mayor or the Council may also require special reports, as deemed necessary.

2-4-11: FUNDING AND DONATIONS.

The Committee is authorized to seek outside funding and in-kind donations for City projects, including programs and capital improvements, as may be approved by the Council and in accordance with City budget procedures.

Memorandum

File #: 25-168 **City Council Meeting**

FROM: Mark Hagedorn, City Treasurer
DATE: Thursday, February 20, 2025
DEPARTMENT: Municipal Services

Subject
Enterprise Resource Planning (ERP) software Contracts

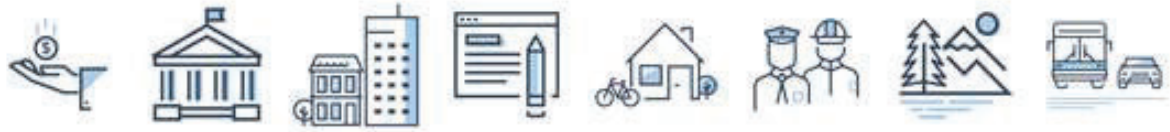
Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve Statement of Work contracts for the implementation of the new Enterprise Resource Planning (ERP) software by Strada and Sprypoint and Whitlock Consulting Group for a total of $4,372,551, and authorize the Mayor and City Clerk to sign all the necessary documents for all contracts (or take other action deemed appropriate).

Description, Background Information & Purpose
On 30 January 2025, the City Council approved the request for proposal for a new ERP software with Workday/Sprypoint with an implementation cost of $3,240,811 and a subscription cost of $306,421 for a total of $3,547,232.

Following the approval, Statement of Work (SOW) contracts with Strada, the Workday implementor, and Sprypoint were negotiated. These contracts are necessary to define the scope of work for both parties in the ERP software integration. Additionally, the project managers strongly recommends a Quality Assurance contract with Whitlock Consulting Group to provide oversight to safeguard the City's interests from both a technical and project management perspective.

As previously discussed, the ERP integration is expected to take up to 18 months, including deployment and post-deployment activities. After finalizing the Scope of Work contracts, the updated implementation cost is $3,801,031, with a revised Year 1 subscription cost of $446,120. This brings the total adjusted cost to $4,247,151, an increase of $699,919. The Whitlock Consulting Group contract is valued at $125,400.

Alignment with City & Department Planning Objectives



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The integration of the new ERP software aligns with the City's commitment to good governance and financial accountability by enhancing access to accurate financial data and improving transparency.

Interdepartmental Coordination
All city departments will be actively involved in the ERP integration. An Executive Committee, composed of department heads, will provide oversight, while a core team of subject matter experts from various departments will drive implementation.

Fiscal Impact
The total cost of this projected will be budgeted over multiple years. $3 million has been budgeted within the current 2024-25 fiscal year.

Legal Review
Legal is reviewing the statements of work.

Master Subscription Agreement

This Master Subscription Agreement is by and between SpryPoint Services, Inc. ("SpryPoint) a Canadian Corporation with offices at 45 Queen Street, Charlottetown, PE C1A 4A4 and City of Idaho Falls, Idaho, a municipal corporation of the State of Idaho ("Client") with offices at 308 Constitution Way Idaho Falls, ID 83405 (each a "Party or collectively "Parties") and shall come into effect on the date last signed by the Parties ("Effective Date").

Whereas SpryPoint provides a subscription Service to which Client intends to subscribe, this Agreement establishes the business relationship and allocation of responsibilities regarding the Service and the Parties therefore agree as follows.

The exhibits and schedules attached hereto are an integral part of this Agreement and are deemed incorporated by reference herein.

SpryPoint agrees to perform the services described below in accordance with the terms and conditions of this Agreement. Should there be a conflict of terms or conditions, this Agreement shall control, and the order of precedence shall be as follows:

1. Master Subscription Agreement
2. Exhibit A – Statement of Work
3. Exhibit B – Pricing Schedule
4. Exhibit C – Service Level Objectives
5. Exhibit D – Insurance Requirements
6. Exhibit E – Data Processing

DEFINITIONS. The following capitalized terms shall have the following meanings whenever used in this Agreement.

"Agreement" means this Master Subscription Agreement, including any exhibits or attachments hereto or any other document explicitly incorporated herein.

"Confidential Information" refers to the following types of material or content one Party to this Agreement ("Discloser") discloses to the other ("Recipient"): (a) any information Discloser marks or designates as "Confidential" at the time of disclosure; and (b) any other non-public, sensitive information disclosed by Discloser including, but not limited to code, inventions, know-how, business, technical, and financial information, or other information which should reasonably be understood by the Recipient to be confidential at the time it is disclosed, due to the nature of the information and the circumstances surrounding such disclosure. Confidential Information does not include information that: (i) is lawfully in Recipient's possession at the time of disclosure; (ii) is independently developed by Recipient without use of or reference to the Discloser's Confidential Information; (iii) becomes known publicly, before or after disclosure, other than as a result of Recipient's or any other person's or entity's improper or illegal action or inaction; or (iv) is obtained by the Recipient from a third party who had the legal right to disclose such information. The Parties acknowledge that Client is a political subdivision of the State of Idaho and is subject to the Idaho Public Records Act, Idaho Code Title 74, Chapter 1. The Parties further acknowledge the Parties' mutual agreement and belief that SpryPoint's Confidential Information is exempt from public disclosure as a "Trade Secret," as defined by Idaho Code § 74-107.

"Client Data" means information that is comprised of data obtained from, used in, stored or generated by the Client as the result of the use of the Service.

"Client Input" means suggestions, enhancement requests, recommendations or other feedback provided by Client, its employees, or any other person or entity acting at the Client's direction, relating to the operation or functionality of the Service.

"Intellectual Property Rights" means any and all common law, statutory and other industrial property rights and intellectual property rights, including copyrights, trademarks, trade secrets, patents and other proprietary rights issued, honored or enforceable under any applicable laws anywhere in the world, and all moral rights related thereto.

"Malicious Code" means viruses, worms, timebombs, trojan horses and other malicious code, files, scripts, agents, or programs.

"Messaging Service" means the messaging capabilities provided with the Service.

"Service" means the SpryPoint applications as identified in the Pricing Schedule and further described in the Statement of Work and Documentation.

"SpryPoint Documentation" means the Service's standard user manuals and any other accompanying documents related to the Service delivered to the Client.

"Updates" means all changes to the Service and SpryPoint Documentation as developed by SpryPoint and made available to the Client.

1. Provision of Service.

1.1 SpryPoint Obligations. SpryPoint shall make the Service available to Client in accordance with the terms of this Agreement.

1.2 Client Obligations. Client must use the Service in compliance with this Agreement and in accordance with the SpryPoint Documentation. Client shall: (a) have sole responsibility for the accuracy, quality, and legality of all Client Data and (b) take commercially reasonable efforts to prevent and be responsible for unauthorized access to, or use of, the Service and notify SpryPoint promptly of any such unauthorized access or use. Client shall not: (i) use the Service in violation of applicable laws; or (ii) send or store Malicious Code by way of the Service or its related systems or networks. Client shall designate named contacts to request and receive support services from SpryPoint. Named support contacts must be trained on the SpryPoint Service for which they initiate support requests. Client shall be liable for the acts and omissions of all persons or other legal entities that it allows to access (including unauthorized access) the Service.

1.3 Acceptable Use. Client acknowledges and agrees that SpryPoint does not police the content of Client Data nor communications of Client or its users transmitted through the Service, and that SpryPoint shall not be responsible for the content of any such

communications or transmissions. Client shall use the Service exclusively for authorized and legal purposes, consistent with all applicable laws and regulations and this Agreement. Client is solely responsible for (a) assuring that the disclosure and use of Client Data, content, or information provided to SpryPoint does not violate any applicable law or infringe upon the Intellectual Property Rights of any third party and (b) using any reports and other materials prepared by Client through the Service in a manner that will not violate any applicable law or infringe upon the Intellectual Property rights of any third party. Client agrees not to post or upload any content or data into the Service which (aa) is libelous, defamatory, obscene, pornographic, abusive, harassing or threatening; (bb) violates the rights of others, such as data which infringes on any intellectual property rights or violates any right of privacy or publicity; or (cc) otherwise violates any applicable law. SpryPoint may remove any violating content posted or transmitted through the Service, without notice to Client. SpryPoint may suspend or terminate any user's access to the Service upon notice in the event that SpryPoint reasonably determines that such user has violated the terms and conditions of this Agreement.

2. Fees.

2.1 Invoices & Payment. All fees are quoted and payable in United States Dollars, unless stated otherwise. All invoiced charges are due net 30 days from the invoice date. Late payments may accrue interest at the rate of 1.5% per month. All payment obligations are non-cancelable, and all payments made are non-refundable. SpryPoint, without limiting its other rights and remedies, reserves the right to suspend the Service until such amounts are paid in full. All fees invoiced pursuant to this Agreement do not include any applicable taxes. Client shall be solely responsible in the event any authority imposes a duty, tax, levy, or fee (excluding those based on SpryPoint's net income) directly upon the Client in relation to this Agreement.

2.2 Usage Metric Verification Process. Client has access to self-service usage metrics on demand and within the Service. Client system administrators can add or remove accounts and users as needed. It is the Client's sole responsibility to archive or remove Users and Accounts if they are no longer being used.

SpryPoint may verify relevant usage metrics through a quarterly audit; the results of which will be shared with the Client. Any within scope use exceeding the usage metrics, as defined pursuant to this Agreement, identified as a result of a quarterly audit will be subject to additional fees based on the then applicable fee per usage metric. Fees accrue in the calendar month the excess use began and will be invoiced coterminous with the then current annual subscription term.

Notwithstanding any quarterly audit referenced above, prior to the issuance of an Annual Subscription Fee invoice SpryPoint will conduct an audit of the relevant usage metric(s) and adjust such Annual Subscription Fee(s) to reflect the usage metric(s) established by such audit.

2.3 Integrated Notification Services. The SpryPoint platform includes integrated notification services which can be enabled by Client for the purposes of customer alerts and notifications. SpryPoint's Integrated Notification services include:

- Inbound and outbound SMS text messaging
- Outbound voice messaging
- Inbound and outbound email messaging

The ongoing usage costs will be invoiced quarterly based on actual usage as identified in Exhibit B Pricing Schedule.

3. Proprietary Rights

3.1 SpryPoint Intellectual Property Rights. SpryPoint retains all right, title, and interest in and to the Service, SpryPoint Documentation and other SpryPoint Intellectual Property Rights including any related methodologies, techniques, processes, and instruction developed by SpryPoint and used in the course of delivering the Service under this Agreement. No rights are granted to Client hereunder other than expressly set forth herein. Client shall not (and shall not allow or cause any third party to) (a) reverse engineer, modify or copy the Service or SpryPoint Documentation or create any derivative works based on the Service and SpryPoint Documentation; (b) copy any features, functions, interfaces, integrations or graphics of the Service or SpryPoint Documentation; or (c) access the Service or SpryPoint Documentation in order to build any commercially available product or service.

3.2 Client Rights. SpryPoint hereby grants to Client a non-exclusive, non-transferable, non-perpetual, limited license to use the Service and SpryPoint Documentation in accordance with the terms and conditions of this Agreement.

3.3 License to Host Client's Data. Client grants SpryPoint and SpryPoint's hosting partners a worldwide, limited-term license to host, copy, transmit and display Client Data, as necessary for SpryPoint to provide the Service in accordance with this Agreement. As between SpryPoint and Client, SpryPoint acquires no right, title, or interest from Client under this Agreement in, or to, Client Data.

3.4 License to use Client's Feedback. Client grants to SpryPoint and its affiliates a worldwide, perpetual, irrevocable, royalty-free license to use and incorporate into the Service any suggestion, enhancement request, recommendation, correction, or other Client Input relating to the Service. SpryPoint shall have no obligation to incorporate Client Input into the Service.

3.5 Statistical Information. SpryPoint owns all aggregated and statistical data derived from the operation of the Service, including, without limitation, the number of records in the Service, the number and types of transactions, configurations, and performance results for the Service. SpryPoint may anonymously compile statistical information related to the performance of the Service for purposes of improving the Service, provided that such information does not identify Client Data or include Client's name.

4. Confidentiality

4.1 Confidentiality. A Party shall not disclose or use any Confidential Information of the other Party except as reasonably necessary to perform its obligations or exercise its rights pursuant to this Agreement except with the other Party's prior written permission or as required by applicable law or by proper legal or governmental authority. If Client is required to disclose SpryPoint Confidential Information pursuant to applicable law or by proper legal authority, Client shall give SpryPoint notice of any such legal or governmental demand and reasonably cooperate with SpryPoint, at SpryPoint's expense, in any effort to seek a protective order or otherwise contest such required disclosure. Nothing in this Paragraph 4.1 "Confidentiality" shall be construed to require Client to violate the Idaho Public Records Act and Client's compliance with the Idaho Public Records Act shall not constitute a breach of obligations of this Paragraph.

4.2 Nondisclosure. A Party shall not use Confidential Information for any purpose other than to facilitate this Agreement. A receiving Party: (a) shall not disclose Confidential Information to any employee or contractor unless such person needs access in order to facilitate the Agreement and executes a nondisclosure agreement with Recipient and (b) shall not disclose Confidential Information to any third party without Discloser's prior written consent.

4.3 Protection. Each Party shall protect Confidential Information with the same degree of care it uses to protect its own Confidential Information, but in no event using less than a commercially reasonable standard of care.

4.4 Injunctive Relief. Recipient agrees that breach of Confidentiality would cause irreparable injury, for which monetary damages would be inadequate**.** If a Recipient discloses or uses any Confidential Information of the Discloser in breach of confidentiality protections hereunder, the Discloser shall have the right to, in addition to any other remedies available, injunctive relief to enjoin such acts.

4.5 Retention of Rights. This Agreement does not transfer ownership of Confidential Information or grant a license or any other right thereto. Discloser will retain all right, title, and interest in and to all of Discloser's Confidential Information.

5. Data Privacy & Security

5.1 SpryPoint use of Data. Client hereby grants SpryPoint a limited right to access, process, collect, store, generate, display, and use Client Data for the sole purpose of providing the Service. Notwithstanding the foregoing, SpryPoint may disclose Client Data as required by applicable law or by proper legal or governmental authority. SpryPoint shall give Client notice of any such legal or governmental demand and reasonably cooperate with Client in any effort to seek a protective order or otherwise contest such required disclosure, at Client's expense.

5.2 Data Security. Each Party shall be responsible for establishing and maintaining its own commercially reasonable data privacy and information security policies, including physical, technical, administrative, and organizational safeguards in relation to the Service.

5.3 Unauthorized Disclosure. If either Party believes there has been a security breach, such Party must notify the other Party upon the earlier of forty-eight (48) hours after discovery or any time frame required by applicable law unless legally prohibited from doing so. Each Party will provide commercially reasonable assistance to the other Party in mitigating such breach.

6. Warranties & Disclaimers

6.1 From SpryPoint.

a) **Function:** SpryPoint represents and warrants that, during the Term of this Agreement, the Service will perform materially in accordance with the SpryPoint Documentation.

b) **Intellectual Property Rights:** SpryPoint represents and warrants that it owns the Service and has the power and authority to grant the rights in this Agreement without the further consent of any third party.

c) **Malicious Code:** SpryPoint represents and warrants that to the best of its knowledge the Service does not contain any Malicious Code.

6.2 From Both Parties. Each Party represents and warrants that it has the full right and authority to enter into, execute, and perform its obligations under this Agreement and that no pending or threatened claim or litigation known to it would have a materially adverse impact on its ability to perform as required by this Agreement.

6.3 Warranty Remedies. In the event of a breach of the warranty as set forth in Section 6.1, or upon the discovery of Malicious Code in the Service, (a) SpryPoint shall correct the non-conforming Service at no additional charge to Client or (b) in the event SpryPoint is unable to correct such deficiencies, after good-faith efforts, Client's exclusive remedy shall be a refund of the subscription fees actually paid by Client for the twelve (12) month period immediately preceding notice to SpryPoint of such breach or discovery.

6.4 Warranty Disclaimer. EXCEPT FOR THE EXPRESS WARRANTIES OUTLINED IN SECTION 6.1 AND 6.2 ABOVE, SPRYPOINT MAKES NO WARRANTIES OF ANY KIND, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE WITH RESPECT TO THE SERVICE AND/OR RELATED SPRYPOINT DOCUMENTATION. SPRYPOINT DOES NOT WARRANT THAT THE SERVICE WILL PERFORM WITHOUT ERROR OR THAT IT WILL RUN WITHOUT INTERRUPTION. THE LIMITED WARRANTIES PROVIDED HEREIN ARE THE SOLE AND EXCLUSIVE WARRANTIES PROVIDED TO CLIENT IN CONNECTION WITH THE PROVISION OF THE SERVICE.

7. Indemnification

. SpryPoint shall protect, defend, hold harmless and indemnify Client harmless against any loss, damage or costs in connection with claims, demands, suits or

proceedings ("Indemnified Claims)" made or brought against Client alleging that the use of the Service infringes any third party's Intellectual Property Rights; provided, however, that Client; (a) promptly gives written notice of the Claim to SpryPoint; (b) gives SpryPoint sole control of the defense and settlement of the Claim; and (c) provides to SpryPoint, at SpryPoint's cost, all reasonable assistance. SpryPoint's obligations set forth in this section do not apply to the extent that such a claim for Indemnification arises out of: (a) Client's breach of this Agreement; (b) revisions to the Service made without SpryPoint's written consent; (c) Client's failure to incorporate Updates; (d) modification of the Service by any person or entity not authorized by SpryPoint to perform such modification (e) unauthorized use of the Service; or (f) use of the Service in a manner inconsistent with the SpryPoint Documentation or the terms of this Agreement. Furthermore, the obligation to indemnify shall not apply if such liability is ultimately adjudicated to have arisen through the negligence or intentional misconduct of Client. If Client is enjoined from using the Service or SpryPoint reasonably believes it will be enjoined, SpryPoint shall have the right at its sole option, to obtain for Client the right to continue use of the Service or to replace or modify the Service so that it is no longer infringing. If neither of the foregoing options is reasonably available to SpryPoint, then use of the Service may be terminated at either Party's option and SpryPoint's sole liability shall be to refund any prepaid fees for the Service that were to be provided after the effective date of termination.

8. Limitation of Liability

8.1 Clarifications and Disclaimer. TO THE MAXIMUM EXTENT PERMITTED BY LAW AND EXCEPT WITH RESPECT TO SPRYPOINT'S INTELLECTUAL PROPERTY RIGHTS, INDEMNIFICATION OBLIGATIONS, RECKLESS MISCONDUCT, GROSS NEGLIGENCE, WILLFUL MISCONDUCT AND/OR FRAUD, IN NO EVENT SHALL SPRYPOINT'S AGGREGATE LIABILITY ARISING OUT OF OR RELATED TO THIS AGREEMENT, WHETHER IN CONTRACT, TORT OR OTHERWISE, EXCEED THE SUBSCRIPTION FEES ACTUALLY PAID BY CLIENT IN CONSIDERATION FOR SPRYPOINT'S SERVICE DELIVERY DURING THE IMMEDIATELY PRECEDING TWELVE (12) MONTH PERIOD FOR THE SERVICE FROM WHICH THE CLAIM AROSE. FOR THE AVOIDANCE OF DOUBT, SPRYPOINT'S LIABILITY LIMITS APPLY TO SPRYPOINT'S AFFILIATES, PROVIDERS, AGENTS, SPONSORS, DIRECTORS, OFFICERS, EMPLOYEES, CONSULTANTS AND OTHER REPRESENTATIVES.

8.2 Exclusion of Damages. IN NO EVENT SHALL SPRYPOINT HAVE ANY LIABILITY FOR ANY INDIRECT, SPECIAL, INCIDENTAL, PUNITIVE OR CONSEQUENTIAL DAMAGES, HOWEVER CAUSED, OR FOR ANY LOST PROFITS, LOSS OF USE, COST OF DATA RECONSTRUCTION, COST OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES, WHETHER IN CONTRACT, TORT OR OTHERWISE, ARISING OUT OF, OR IN ANY WAY CONNECTED WITH THE SERVICE, INCLUDING BUT NOT LIMITED TO THE USE OR INABILITY TO USE THE SERVICE, ANY INTERRUPTION, INACCURACY, ERROR OR OMISSION.

9. Term & Termination

9.1 Term of Agreement. This Agreement shall be valid as of the Effective Date and remain in effect until terminated pursuant to the terms contained herein.

9.2 Renewal. The Service shall automatically renew for successive terms of one year unless either Party provides the other written notice of termination a minimum of thirty (30) days prior to the expiration of the current term or the Service has been otherwise terminated in accordance with this Agreement.

9.3 Annual Escalation. The annual subscription service fee for the Service shall be subject to adjustment on each annual anniversary of the Effective Date at the higher of the following:

a) in accordance with the change in the USA Consumer Price Index ("CPI") as published by the Government of the United States. The CPI will be determined based on the percentage increase in the CPI for the twelve (12) month period ending with the calendar month which is three (3) months prior to the annual anniversary of the Effective Date

b) 5%.

9.4 Termination for Default. Either Party may terminate this Agreement upon thirty (30) days prior written notice in the event of a material breach by the other Party if such breach remains uncured at the expiration of such notice period.

9.5 Non-Appropriation. The Parties acknowledge that Client is a political subdivision of the State of Idaho. This Agreement is contingent upon Client receiving the necessary public funding to cover the obligations of Client. In the event that such funding is not received or appropriated, then, and in that event, Client's obligations under this Agreement shall cease and each Party shall be released from further performance under this Agreement without any liability to the other Party, and SpryPoint shall be entitled to receive just and equitable compensation for any work satisfactorily completed hereunder.

9.6 Effect of Termination. Upon any termination of this Agreement, Client shall, as of the date of such termination, immediately cease accessing and otherwise utilizing the applicable Service. Termination for any reason shall not relive Client of the obligation to pay any fees accrued or due and payable to SpryPoint prior to the Effective Date of termination.

9.7 Access to Client Data. Upon written request by Client made prior to any expiration or termination of this Agreement, SpryPoint will make Client Data available to Client through the Service solely for purposes of Client retrieving Client Data for a period of up to sixty (60) days. After 60 days, SpryPoint will have no obligation to maintain or provide any Client data and shall thereafter, unless legally prohibited, delete all Client Data and will have no further obligation to make it available to Client.

10. Messaging.

10.1 Supplemental Messaging Service Terms. If Client elects to use SpryPoint's Messaging Service, the following supplemental terms ("Messaging Terms") will apply.

10.2 Responsibility & Risk. Client shall be solely responsible for the content of any communications which Client initiates or authorizes in connection with the Messaging Services. SpryPoint shall have no responsibility or liability with respect to messages or communications initiated or authorized by Client. Client assumes all risks associated with use of the Messaging Service

10.3 Messaging Indemnity. To the extent permitted by applicable law, Client shall hold harmless, defend and indemnify SpryPoint and its officers, directors, employees, contractors and representatives from and against all claims, damages, losses and expenses including without limitation any statutory damages, penalties and attorney's fees arising out of or relating to the Messaging Service or any breach by Client of the Agreement including without limitation, these Messaging Terms.

10.4 Compliance. SpryPoint is limited to delivering the Messaging Service to the Client as part of the Service, accordingly, compliance with applicable laws is strictly Client's responsibility with respect to the Messaging Service notwithstanding any provision to the contrary.

11. Miscellaneous

11.1 Independent Contractor. SpryPoint and all persons employed by or contracted by SpryPoint to furnish labor and/or materials under this Agreement are independent contractors and do not act as agents or employees of Client. SpryPoint has full rights to manage its employees in their performance of the Service under this Agreement. This Agreement does not create, nor is it intended to create a partnership, franchise, joint venture, agency, fiduciary, or employment relationship between the Parties. There are no third-party beneficiaries to this Agreement.

11.2 Piggyback. It is understood and agreed by Client and SpryPoint that any governmental entity may purchase the services specified herein in accordance with the prices, terms, and conditions of this agreement. It is also understood and agreed that each local entity will establish its own contract with SpryPoint, be invoiced therefrom and make its own payments to SpryPoint in accordance with the terms of the contract established between the new governmental entity and SpryPoint. It is also hereby mutually understood and agreed that Client is not a legally bound party to any contractual agreement made between SpryPoint and any entity other than Customer.

11.3 Governing Law. This Agreement shall be governed exclusively by the internal laws of the State of Idaho. In the event of litigation concerning this Agreement, it is agreed that proper venue shall be the United States District Court, District of Idaho, or the District Court of the Seventh Judicial District of the State of Idaho, in and for the County of Bonneville.

11.4 Notices. All notices under this Agreement shall be in writing and shall be deemed to have been given upon the third business day after first class mailing.

Notices to the Client shall be sent to:

City of Idaho Falls
308 Constitution Way
Idaho Falls, ID 83405
Attention: Mark Hagedorn

Notices to SpryPoint shall be sent to:

Nick Stone, CFO
45 Queen Street
Suite #401
Charlottetown, PE C1A 4A4

11.5 Waiver. No failure or delay by either Party in exercising any right under this Agreement shall constitute a waiver of that right or any other right. Neither Party's review, provision, acceptance, nor payments for any of the Services provided under this Agreement shall be construed to operate as a waiver of any SpryPoint's rights under this agreement or of any cause of action available to SpryPoint arising out of the performance of this Agreement.

11.6 Force Majeure. In no event shall SpryPoint be responsible or liable for any failure or delay in the performance of its obligations hereunder arising out of or caused by, directly or indirectly, forces beyond its control, including, without limitation, strikes, work stoppages, accidents, acts of war or terrorism, civil or military disturbances, nuclear or natural catastrophes or acts of God, and interruptions, loss or malfunctions of utilities, communications or computer (software and hardware) services; it being understood that SpryPoint shall use reasonable efforts which are consistent with accepted software industry practices to resume performance as soon as practicable under the circumstances.

11.7 Assignment. Neither Party may assign this Agreement or any of its rights or obligations hereunder without the prior written consent of the other Party (which consent shall not be unreasonably withheld).

11.8 Severability. To the extent permitted by the law, the Parties waive any provision of law that would render any clause of this Agreement invalid or unenforceable. In the event that a provision herein is held to be invalid or unenforceable, such provision will be interpreted to fulfill its intended purpose to the maximum extent permitted by the law, and the remaining provisions of this Agreement will continue in full force and effect.

11.9 Publicity. Except as required for the Service, SpryPoint shall not use Client's name, logos, or trademarks in any written press releases, advertisements and/or marketing materials without the prior consent of Client. SpryPoint is authorized to use Client's name as required to perform the Service.

11.10 Amendment. This Agreement may only be amended in writing by authorized representatives of each Party.

11.11 Execution in Counterparts: This Agreement may be executed in one or more counterparts. Each counterpart will be an original, but all such counterparts will constitute a single instrument.

11.12 Non-Discrimination: During the term of this Agreement, SpryPoint shall not discriminate against any employee or applicant for employment on the basis of race, color, religion, creed, political ideals, sex, age, marital status, physical or mental handicap, gender identity/expression, sexual orientation, or national origin.

11.13 Anti-Boycott Against Israel Act: Pursuant to Idaho Code § 67-2346, if payments under this Agreement exceed one hundred thousand dollars ($100,000) and SpryPoint employs ten (10) or more persons, SpryPoint certifies that it is not currently engaged in, and will not for the duration of this Agreement engage in, a boycott of goods or services from Israel or territories under its control. The terms in this Paragraph that are defined in Idaho Code § 67-2346 shall have the meaning defined therein.

11.14 Certification of No Chinese Ownership: Pursuant to Idaho Code § 67-2359, SpryPoint certifies that SpryPoint is not currently owned or operated by the government of the People's Republic of China and will not, for the duration of this Agreement, be owned or operated by the government of the People's Republic China.

(signature block on following page)

Client Name	SpryPoint Services, Inc.
Signature:	Signature:
Name:	Name: Nick Stone
Title:	Title: Chief Financial Officer
Date Signed:	Date Signed:

SpryPoint
SMART SOLUTIONS FOR SMART UTILITIES

SpryPoint
SMART SOLUTIONS FOR SMART UTILITIES

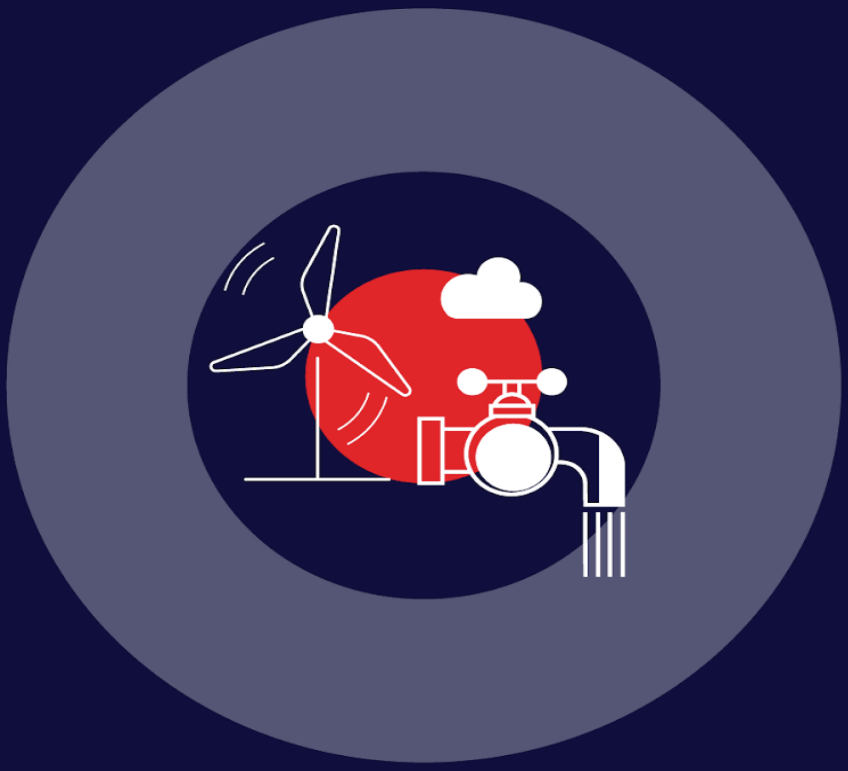

Exhibit A - Statement of Work

SpryMobile - Work and Asset Management System (WAMS)

45 Queen Street
Charlottetown, PE
C1A 4A4, Canada

SpryPoint.com

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Statement of Confidentiality

The contents of this document are confidential and are supplied on the understanding that they will be held confidentially and not disclosed to third parties without the prior written consent of SpryPoint.

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1. Introduction

This Statement of Work (SOW) is entered into per the Agreement Date by and between **SpryPoint** Services Inc. (hereinafter "**SpryPoint**"), with principal offices in Charlottetown, PE, Canada, and City of Idaho Falls ("the **Client**") with offices in Idaho Falls, ID, United States.

Background Statements:

- **SpryPoint** will provide SpryMobile – Work Orders & Asset Management (WAMS) to support **Client**'s operational needs around Work Orders & Asset Management.

- **Client** wishes to work together with **SpryPoint** for the implementation of the Solution and **SpryPoint** agrees to provide such services and/or software as agreed to in the terms provided herein.

- **SpryPoint** to partner with Strada to ensure the successful completion of the project, reporting directly into the joint program structure outlined in **Strada's** Exhibit B document *'**Strada** Program Management – **Workday** and **SpryPoint** Deployment'*

- This Statement of Work provides the general detailed terms and provisions that govern the delivery of all services and/or deliverables to **Client** by **SpryPoint**.

1. Project Goals and Objectives

1.1. Success Criteria

This statement of work will be deemed fully executed and successfully completed when the following criteria have been met:

- All listed products have been configured, tested, users trained and cutover to a production environment.
- **Client** is using the contracted **SpryPoint** solution(s) as the system of record for a period of 14 days or more.
- All deliverables listed in this document have been completed.
- Three (3) months of Post Go Live Support have been completed, with Priority 1 and 2 issues resolved.

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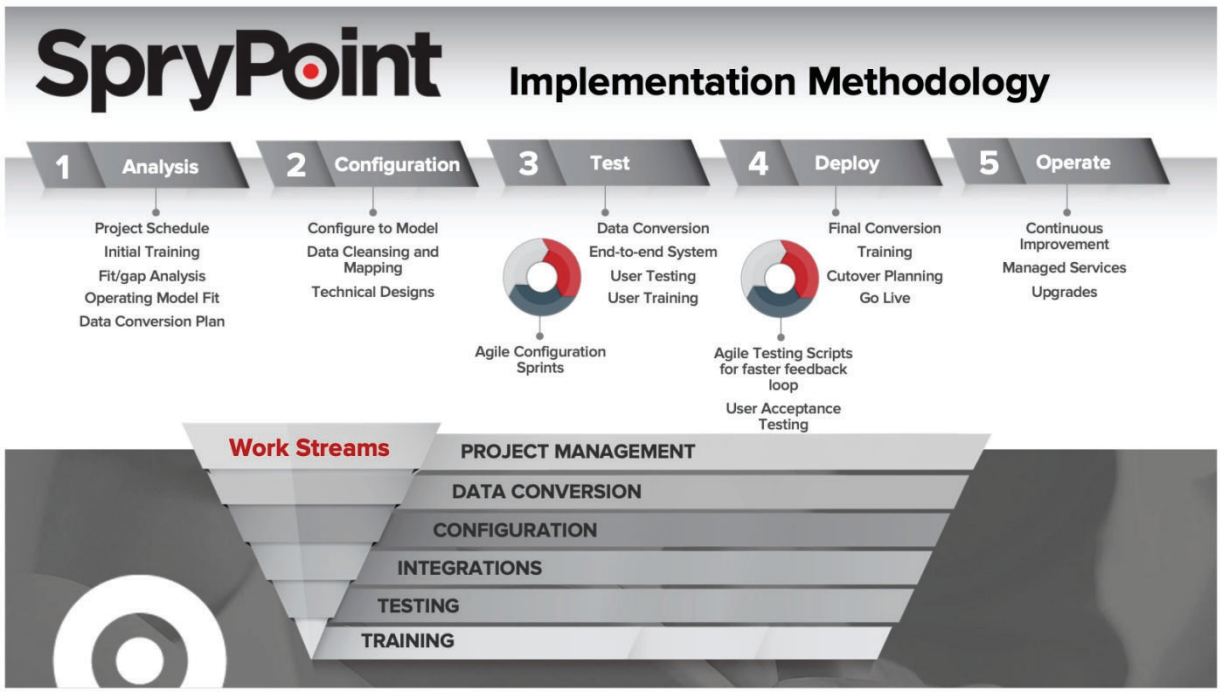
2. Scope of Work

2.1. Overall Project Approach

SpryPoint shall use its implementation methodology, to deliver the SpryPoint Service, while reporting and delivering to the Client the requested deliverables and service levels in this SOW. SpryPoint will use its hybrid approach that brings together the best of the traditional waterfall methodology and combined it with the best elements of the agile methodology. This methodology encompasses Project Management tasks, Pre-project tasks, and five (5) phases, as follows:

- Analysis
- Configure
- Test
- Deploy
- Operate

The project scope assumes all **SpryPoint** Products will go live at the same time. If it is determined during implementation to split up the go live of one or multiple products; the change order process will be engaged to outline any project impacts.



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2.2. Pre-Project Initiation

Upon contract signing before Project Initiation there are several pre-project activities the client can chose to prepare for the implementation. Completion of these activities is not mandatory to start the project but will need to be at some point through the project.

- Documentation to gather
  - Operating polices
    - ✓ Any documentation on Standard Operating Procedures
    - ✓ Published rules/polices
    - ✓ Internal documentation – How To's/Workflows, etc.
  - Gather Lists of Information
    - ✓ Asset Types
    - ✓ Work Order Types
    - ✓ Preventive Maintenance Schedules
  - Staffing and Roles
    - ✓ Identify Subject Matter Experts
    - ✓ Grid of staff, roles, and responsibilities
    - ✓ Field Operation users that will need to be engaged with SpryMobile
  - Data Cleansing
    - ✓ Start to identify problem records
    - ✓ Identify problems with data that you would like to resolve
    - ✓ Identify fields that are multipurpose

2.3. Project Initiation

Project Initiation describes the collaboration between the **Client** and SpryPoint to begin the project. SpryPoint cannot start project initiation until the contracts have been fully executed.

Within 60 days contract execution, **SpryPoint** will initiate the project, and start preparation and mobilization of its resources in accordance with the requirements defined in this SOW.

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2.3.1. Project Initiation – Deploy Environments

As part of the project initiation **SpryPoint** will work with the **Client** to deploy environments. The **Client** will need to provide a static IP that and work with **SpryPoint** to whitelist this address. Included in the scope is the following environments. Deployment of the environments will occur as defined in Exhibit A CIS Statement of Work.

2.3.2. Project Initiation – Deliverables, Roles & Responsibilities

For this implementation to be successful, there are various levels of engagement that are required by team members on both the **Client** and **SpryPoint** teams. The RACI charts are designed to demonstrate who needs to perform work on each project deliverable. The following key will be used for each RACI to explain the level of engagement required.

R = Responsible – Assigned to complete the task/i.e., you will have work to do

A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done

C = Consulted – provides input into a task and/or consulted before a decision or action

I = Informed – Must be informed after a decision or action

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No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist(s)	Executive Sponsor	Project Manager*	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
PI1	Mobilize Project Team	Identify and assign team members and introduce teams	A	R	I					
PI2	Mobilize Client Project Team	Identify and assign team members and introduce teams				A	R	I	I	C
PI3	Pre-Project Kickoff	Initial Project Managers Meeting to introduce people outline next steps, schedule meetings, and start project work	A		I	R				I
PI4	Prepare project infrastructure	Send welcome information, setup shared drives and access	A			R	R			
PI5	Initial Project Schedule	Update project plan that will be used as baseline for project, and updated regularly	A/R			C				
PI6	Project Kickoff	Formal meeting to kickoff project. This includes the following activities: • Meeting agenda • Meeting presentation	A	R	R	C	C	I	I	I
PI7	Environment Setup	Provision environments and provide access for core team	A	R		C	C			

Key: R= Responsible – Assigned to complete the task/i.e., you will have work to do; A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done. C = Consulted – provides input into a task and/or consulted before a decision or action; I – Informed – Must be informed after a decision or action

2.4. Analysis

The purpose of the Analysis phase is to gather the specific information needed to complete configuration of SpryMobile. This phase is also used to clarify any business requirements and processes and/or identify any gaps that may exist.

2.4.1. Analysis – Overview/System Familiarization

During this phase either before or as part of the workshops **SpryPoint** will complete an overview training session. The purpose of this session is to introduce the core team member to the SpryPoint product(s).

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2.4.2. Analysis - Workshops

A **SpryPoint** team member will lead workshops involving appropriate **SpryPoint** project resources, and **Client** business process experts to create an Analysis Report. These workshops and the resulting documentation will work to define the future business processes and also identify any gaps between the future business processes and SpryPoint Functionality.

SpryPoint and **Client** will jointly identify and document the business processes. **SpryPoint** will provide draft copies of the Analysis Report and other documentation on an agreed upon timeframe for review by **Client** to ensure accuracy of the information gathered.

Prior to the workshops **SpryPoint** will:

- Develop Workshop schedule/agenda with input from the **Client**
- Prior to interviews, **SpryPoint** staff will familiarize themselves with the **Client's** legacy system using available material provided by the **Client**, personal interviews, and other such information as needed.

During this activity **SpryPoint** will:

- Conduct workshops to discuss possible organizational changes that may result from implementing the new system, and how to manage them.
- Conduct individual or group interviews to confirm current business processes, review standard configuration of the **SpryPoint** Service in relation to the processes listed below, recommend process changes based on the best practices with the **SpryPoint** Product(s), and identify modifications or configuration changes that are needed, or that could be mitigated by the adoption of recommended business practice changes.

    - Work Orders
    - Asset Management
    - Preventive Maintenance
    - Dispatching

Some key areas to be covered in this process include:

- What are the primary **Client** challenges related to Asset Management & Work Orders?
- Who will use the SpryPoint Service?
- What tasks and functions do they need to complete?
- How will it affect how staff execute their daily work?
  What are the primary challenges related to Asset Management & Work Orders?

Note: other workshop sessions may be identified and required to ensure all business needs are being met.

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This information will be gathered and documented in the data conversion strategy document.

2.4.3. Analysis – Deliverables, Roles & Responsibilities

No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist (s)	Executive Sponsor	Project Manger	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
A1	System Familiarization	A product overview session(s) that are designed to provide the client with a look at how the SpryPoint product(s) work before the analysis workshops	C	A		C	R			
A2	Workshop Questionnaires	Document(s) with questions that will need to be answered by the core team and are used as part of the discovery workshop sessions. Note: The SpryPoint PM may determine these are not required for the project	C	A		R	R			
A3	Topic Specific Workshops	Workshop(s) will be completed to discuss the requirements in each area and identify any gaps. An agenda will be provided for each workshop.	R	A		C	R			
A4	Analysis Report	A document that outlines the information gathered during the discovery. This document will outline any gaps identified during the workshops	R	A		C	C			I
A5	Analysis Report Sign Off	Client and SpryPoint to review Analysis Report and findings of information gathered during discovery. Client to provide sign off/acceptance.	R			A	R			

Key: R= Responsible – Assigned to complete the task/i.e. you will have work to do; A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done. C = Consulted – provides input into a task and/or consulted before a decision or action; I – Informed – Must be informed after a decision or action

2.5. Configuration

The configure stage is the period in the project where the project teams work to complete the initial "setup" of the **SpryPoint** product(s) to meet the specific business process requirements of the **Client** as defined in the Analysis document.

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2.5.1. Configuration – Configuration Workbook & Workshops

To document and track the configuration, **SpryPoint** uses a configuration workbook. To populate the configuration workbook an agreed upon schedule of Configuration meetings are scheduled. While **SpryPoint** is accountable for maintaining the workbook, the client will be asked to be responsible to provide updates and input into the workbook. The purpose of the configuration workbook is as follows:

- Provide a checklist of all required configuration
- Document configuration settings
- Show where configuration have been completed (i.e., Production Environment or Staging Environment)

At this point in the project this will be referred to as the initial configuration. As **SpryPoint** works with the **Client** through the implementation changes to configuration may be required. SpryPoint will be responsible to ensure the configuration is updated with these changes.

2.5.2. Configuration – Data Extraction & Data Import Assistance

SpryMobile WAMS uses an import approach for Data Migration. The Client will be required to extract the data in the requested formats. SpryPoint will import this data into SpryMobile WAMS. It should be noted that while **SpryPoint** is responsible for loading of data, the **Client** must provide user(s) who understand how the **Client** currently uses the system and to complete data extraction and to work with SpryPoint on transformation activities.

Included in the scope of the project is 2 test data imports and the go live data import.

SpryMobile Work and Assets Management Objects to Convert

Object	Details	Data Source
Work Orders	All active work order header details within the agreed time	Naviline
Preventative Maintenance	Preventative Maintenance Work Orders	Naviline

2.5.3. Configuration – Integrations & Enhancements

Based the details provided in this SOW and additional workshops (if required) for each interface and enhancement, SpryPoint will provide a requirement document to the **Client** to review, provide feedback, and sign off. Once the requirements document is signed off, configuration and/or development will be completed. Also, during this process

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each identified interface, and/or enhancement will be identified as required for Go-Live or not. This information will be used to help prioritize the delivery of this work. SpryPoint will work with the Client and any third-party vendors to develop, and test integrations. The Client is responsible for coordinating and managing any third-party vendors. Interfaces and enhancements, not listed in this document in Section 3, will be deemed out of scope and the change order process will be initiated.

2.5.4. Configuration – Reports & Dashboards

During configuration, **SpryPoint** will work with the client to configure:

- Dashboard – **SpryPoint** will work with **Client** to configure a Work Order and Asset Management Dashboard of key metrics using the out of the box Metabase Dashboards.
- Reports - **SpryPoint** will work with appropriate **Client** project team member(s) to review the out of the box reports and provide training on using Metabase to modify reports.

Note: The scope of this of this project includes 24 hours allocated to the configuration of Reports and Dashboards to meet **Client** reporting needs.

2.5.5. Configuration – Core Team Training

During the configuration **SpryPoint** will provide training to the core team members. This training will provide the required skills to operate the SpryPoint in scope products.

2.5.6. Configuration – Security & Roles

Based on the out of the box security plan, the client will be responsible to assign security roles to users. The client can either use the out of the box security roles or they can create their own. When new functionality is released, **SpryPoint** is responsible to update the out of the box security roles only. If the client has created their own custom security roles, they will be responsible to update any security related to new features into these roles.

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2.5.7. Configuration – Deliverables, Roles & Responsibilities

No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist(s)	Executive Sponsor	Project Manger	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
C`1	Configuration Workshops	Workshops that are held on an agreed upon schedule to determine the initial configuration requirements	R	A		C	R			
C2	System Configuration(s)	The process to complete configuration in environments	R	A		C	R			
C3	Reports & Dashboards	Review out of box Reports & Dashboard	R	A		C	R			
C4	Security Configuration	The process of assigning users to security roles		C		A	R			
C5	Core Team Training	Training provided to core team users	R	A		R	R	R		
C6	Data Extraction Assistance	Extraction template, guidance and support during Client lead extraction activities	A	R		R	R			
C7	Data Import Assistance & Data Mapping	Work Orders and Assets objects converted. Initial completion of data mapping workbook.	A	R		A	R			
C8	Integration & Enhancements	Configuration of any in scope Integrations & Enhancements	A	R		C	R	R		
C9	System Ready for Testing	Initial system configuration completed and system ready for testing	A	R		R	R			

Key: R= Responsible – Assigned to complete the task/l.e you will have work to do; A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done. C = Consulted – provides input into a task and/or consulted before a decision or action; I – Informed – Must be informed after a decision or action

2.6. Test

The Test phase's primary focus is on testing. The key to mitigating risk and gain user confidence in the new business processes. This completed through **SpryPoint**'s systematic and thorough testing. **SpryPoint**'s iterative testing methodology adds a layer of thoroughness at each step, building on the success of the previous steps.

2.6.1.1. Summary of Test Rounds

The following Table provides a summary of the Test rounds. Specific details on each category can be found in the sections that follow.

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If a test script fails within the round, the script will be retested until it passes. Depending on the reason for the additional testing, a change order may be required.

Testing Type	Max number of Test Rounds
Functional Testing	1
Integration Testing	1
User Acceptance Testing	1
Total	**3**

2.6.2. Test – Functional Testing

The main purpose of the Functional Testing step is to establish that decisions made during the configuration phase of the project will be in line with **Client**'s business requirements. Functional Testing utilizes scenarios based on industry best practice. To facilitate functional testing, **SpryPoint** and **Client** will test scenarios as broken into two categories:

- **Primary Scenarios -** These scenarios involve functionality relating to the core business processes and are the most common end-user functionality.
- **Secondary Scenarios -** These scenarios involve testing a broader spectrum of functionality designed to test unique, Client-specific functionality and infrequent or less common processes.

2.6.3. Test – Integration Testing

Integrated Testing will focus on these five main areas:

- Core integrated testing which tests major batch processes;
- Financial scenarios which focus on validating financial transactions;
- Integrated testing scenarios inclusive of primary and secondary scenarios;
- Unit (Singular) testing of interfaces and enhancement(s);

SpryPoint is responsible to complete initial testing of integrations to ensure they meet the requirements as outlined in the requirements document(s). It is recommended that the **Client** complete their own testing of the integrations.

Included in the scope of this project is 1 round of Integration Testing.

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2.6.4. Test – User Acceptance Testing

User Acceptance Testing cannot be deemed completed or accepted until all objects including but not limited to configuration, reports, interfaces, business processes and user security deemed as required for go live.

Note: In some cases, there may be a reason why an item may not be available during user acceptance testing. If this occurs this item(s) needs to be documented with a plan for to validate the item(s).

During User Acceptance Testing the **Client** will be accountable to complete any required testing, however, the **SpryPoint** team will be available to answer questions and help resolve any questions, issues, or concerns.

2.6.5. Test – Test Scripts

A test case is a document that outlines an element or scenario to be completed during a specific test cycle (feature, function, interface, etc.). Each test case must meet the following requirements:

- Uniquely numbered and named
- Identifies the functional/business domain recommended to be tested
- Describes the testing purpose
- Specifies the environment to be used
- Outlines any dependencies

SpryPoint will provide out of the box test scripts based on the standard business processes. The **Client** will be responsible to work with SpryPoint to modifying test scripts to meet their custom needs and identify edge cases.

2.6.6. Test – Deliverables, Roles & Responsibilities

No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist (s)	Executive Sponsor	Project Manger	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
T1	Execute Functional Testing	Activities required to complete a round of functional testing	A	R		A	R			
T2	Execute User Acceptance Testing	Final testing performed by the client Key Users and any identified testers prior to system sign-off. Security,	R	R		A	R	R		

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No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist (s)	Executive Sponsor	Project Manger	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
		Modifications and Reports testing will be performed as part of UAT.								
T3	Execute Integration Testing	Activities required to complete a round of Integration testing	A	R		R	R			

Key: R= Responsible – Assigned to complete the task/ you will have work to do; A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done. C = Consulted – provides input into a task and/or consulted before a decision or action; I – Informed – Must be informed after a decision or action

2.7. Deploy

The Deploy phase is the point at which **Client** and **SpryPoint** decide whether all critical pieces are in place to turn the system over to production. This phase includes a production readiness evaluation, cutover planning, and remaining end user training.

SpryPoint and **Client** will develop a Cutover Plan prior to the proposed Go-live date. **SpryPoint** and **Client** will stage all aspects of the system in preparation for production cutover.

The Production Readiness phase focuses on four critical areas:

1. **Application Readiness**. Is the application tested and ready for production? This includes modifications, interfaces, and reports needed to run in full operations.
2. **Data Readiness**. Is the data ready for operations? Have all data issues been resolved or planned for during the cutover period?
3. **Process Readiness**. Have the business processes been reviewed? Have all business process-reengineering tasks been completed and made ready for operations?
4. **Resource Readiness**. Are all the end-users trained? Is Client's staff trained to deal with problem-solving during the business cycle?

2.7.1. Deploy – Prerequisites

To cutover to production the following criteria must be met:

- User Acceptance Testing must be completed and signed off
- All issues marked as required for go live must be completed and signed off

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- All integrations marked as required for go live must be completed, tested, and signed off
- Required training is completed and signed off on

Note: the above list is the standard agreement, however, in some cases there may be item(s) that may not be accomplished until go live. Any desired expectation(s) to this list need to be document with a plan outlined and relevant details and mutually agreed upon by both parties.

2.7.2. Deploy – Go Live Cutover Plan

SpryPoint will develop a Go Live Cutover Plan which outlines all issues pertaining to the achievement of operational stability. The plan is based on experiences gathered from other **SpryPoint** production cutovers, an on-going evaluation of best practices in the industry, and specific issues that arose during the configuration and testing of the software for **Client**.

Prior to Go Live Priority 1 and 2 issues will be resolved.

2.7.3. Deploy – End User Training

Before Go-Live **SpryPoint** will work with the **Client** to identify and deliver any required refresher training that the users require.

While **SpryPoint** will make every effort to complete end user training as close to go live as possible, there may still be a period between training and go live. As a result, the **Client** agrees to establish a practice lab and a schedule where trained users are schedule and required to spend time practicing what they have been trained on.

End User Training sessions to be broken out by user role, including Administrative/Power User, Field Technicians, and any other mutually agreed to user groups identified during the Analysis phase of the project.

2.7.4. Deploy – Go Live & Post Go Live Support

2.7.4.1. Deploy – Mock Go Live

The Mock Go-Live acts as a dress rehearsal for the actual Go-Live weekend and Monday morning activities. This practice run is used to ensure everyone understands their roles and responsibilities for the actual Go-Live. In addition, it allows **SpryPoint** to validate the schedule and timings for the cutover. This includes any manual entries required after the completed conversion and validation of all reporting. Some users will be asked to run testing to ensure they understand what is going to happen when the business opens on Monday morning.

Included in scope are two (2) Mock Go Live rehearsals.

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2.7.4.2. Deploy – Go Live

This phase includes the system shutdown time when the cut-over to production occurs. Most of this work is performed when the office is closed. During this time, the final data conversion is completed, and all other steps as identified in the cut-over plan are completed, and validation is performed to ensure everything is in place to open the office.

2.7.4.3. Deploy – Post Go Live Support & Stabilization

This is the initial period after go-live where the Client's focus is on system stabilization.

During this period, the **Client** is using the **SpryPoint** product(s) to complete their day-to-day responsibilities and run their business. The **SpryPoint** implementation team will use remaining allocated hours for this phase to answer **Client** questions, provide refresher training, resolve any application issues.

At the end of the post go live stabilization period a punch list is created. This list contains:

- Any issues and their priority still open at the end of the stabilization period
- Any SOW items that were not delivered prior to go live

In scope for this project are 3 months of Post Go Live Support. These hours are intended to be front loaded and will ramp down over the three month period, as the system stabilizes.

2.7.5. Deploy - Deliverable(s), Roles & Responsibilities

No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist (s)	Executive Sponsor	Project Manger	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
D1	Mock Go Live	A dress rehearsal to prepare for a successful Go-Live	A	R		R	R	R		
D2	Go Live Plan	A document that outlines the plan for go live, including any schedules and checklists for the go live weekend.	A	R	I	R	R	R		I
D3	Refresher Training	Complete identified refresher training for user as agreed with Client	C	A		C	R		R	
D4	Go Live Activities	Complete all cutover activities as defined in the cutover plan	A	R	I	R	R		R	I
D5	Issues Log Updates	The issues log that gets updated with any issues that occur during cutover	A	R		R	R			
D6	Go Live Signoff	A document that confirms that the system is ready for production use and that the	R	R	I	A	R			C

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No.	Deliverable Name	Deliverable Description	Project Manager	Implementation Specialist (s)	Executive Sponsor	Project Manger	Core Team	Testers	End Users	Executive Sponsor
			SpryPoint			Client				
		client is ready to being using the SpryPoint solution(s) as the system of record								
D7	End User Training	Training for users is teaching them how to use the **SpryPoint** products, as identified in the training plan.	A	R		C	R		R	

Key: R= Responsible – Assigned to complete the task/I.e you will have work to do; A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done. C = Consulted – provides input into a task and/or consulted before a decision or action; I – Informed – Must be informed after a decision or action

2.8. Operate

The purpose of this phase is to ensure complete and successful transfer to the **SpryPoint** Service and provide **Client** with direct access to the implementation team personnel. The **SpryPoint** implementation team will work together with your production staff to ensure the systems are well understood and functioning properly.

2.8.1. Operate – Transition to Customer Success

After the post go live period has been completed and we will transition the client to the Customer Success team. The transition involves a **SpryPoint** internal knowledge transfer between the Service Delivery and Customer Success Teams and an introduction meeting with the client, **SpryPoint** Project Manager, and the **SpryPoint** Customer Success Team. Once the transition to the Customer Success team has occurred the **SpryPoint** implementation team will continue to be accountable for the resolution of all items on the punch list and the Customer Success Team will be accountable for any new issues.

2.8.2. Operate – Project Close Out

The project close out is the point of the project where both parties agree that all project deliverables have been completed per the Statement of Work and the Implementation portion of the contract is completed and closed, and any remaining contract monies will be paid.

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2.8.3. Operate – Deliverables, Roles, & Responsibilities

No.	Deliverable Name	Deliverable Description	SpryPoint			Client				
			Project Manager	Implementation Specialist(s)	Customer Success	Project Manager	Core Team	Testers	End Users	Executive Sponsor
O1	Transition Documentation	SpryPoint Internal Documentation used to provide the Customer Success Team information about the client and their project	A	R	R					
O2	Transition to Customer Success Meeting	A meeting held with SpryPoint to introduce them to the Customer Success Team and how they work with them	A	R	R	R	R			I
O3	Finalize Punchlist	A document that lists any open items that need to be resolved as part of the scope of the product	A	R	I	R	R			
O4	Signoff on Punchlist	Acknowledgement, by the client that they have reviewed the punchlist and they agree to it	R			A	R			I
O5	Project Close Out Document	A document that summarizes project details	A	R		R	R			
O6	Project Close Out Signoff	Acknowledgement, by the client that all SOW deliverables have be completed and the project has been signed off and closed.	I			A	R			C
O7	Post Go Live Support (3 months)	Three months of Post Go Live Support through the stabilization period	A	R		C	C			

Key: R= Responsible – Assigned to complete the task/I.e you will have work to do; A = Accountable – Has final decision-making authority and accountability for completion; this person will ensure the work gets done. He/she may or may not be doing work but needs to make sure the work gets done. C = Consulted – provides input into a task and/or consulted before a decision or action; I – Informed – Must be informed after a decision or action

2.9. Project Governance

2.9.1. Project Management (PM)

SpryPoint uses a highly structured and layered project management methodology, which relies on detailed and complete project plans, to determine who is working on what tasks, and when, throughout the life of the project. Central to **SpryPoint**'s philosophy is maintaining strong communication throughout the teams, setting expectations early, facilitating and coaching as required and monitoring progress.

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SpryPoint will provide a Project Manager throughout the life of the project who will work directly with **Client's** Project Manager and the joint team to ensure that all project responsibilities are met.

SpryPoint and **Client** Project Manager shall be responsible for the planning and execution of the project. They shall work collaboratively to manage all project activities from project management activities, including planning and execution and project communications throughout the project. The **Client's** Project Manager is ultimately accountable for the **Client's** resources, project tasks and internal project plans and SpryPoint's project manager is accountable for our resources and project tasks. Both project managers will need to work together and retain the authority for day-to-day project decisions and ensure project success.

2.9.2. Project Communications & Tools

The **SpryPoint** Project Manager, working in conjunction with the **Client** Project Manager, and **Strada** Project Manager will compile status reports for distribution to **Client, Strada** and **SpryPoint** management. Regular meetings will be held to review overall status, schedule, and open issues noted in the status report. Meeting cadence has been specified below.

As the implementation experts **SpryPoint** agrees to communicate clearly which issues/tasks are on the critical path and have immediate impact on the project schedule and which issues/tasks are not. For issues that are not on the critical path the **SpryPoint** Project Manager will monitor these to ensure that these do not become critical path issues/tasks.

Communication Method	Frequency	Tool/Method	Attendees
Project Team Status Meetings	Every second week	Zoom & Google Docs/PDF	SpryPoint & Client PM's, Client Core Team, SpryPoint Project Team (as required)
Program Team Status Meetings	Every second week	Zoom & Google Docs/PDF	SpryPoint, Client, & Strada PM's, Client Core Team, SpryPoint Project Team (as required), Strada Project Team (as required)
Project Status Reports	Monthly	Google Slide/PDF	N/A

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Updates to the project plan	Monthly	Kantata/Excel or pdf	N/A
Issue Log	Weekly	Google Sheet	N/A

With the understanding that both **SpryPoint** and the **Client** are working with the joint interest in doing what is best for the project the table above outlines the standard agreement for communications. If major project events occur, or at a critical point in the project that require addition communications, updates, or meetings, both parties can mutually agree to the additional activities at no extra cost to the **Client**.

2.9.3. Acceptance Period

To facilitate the project schedule and project planning it is important both parties agree to a default acceptance period of five (5) business days. While this will be the default time, either party can proactively ask for a longer time if the time is not sufficient or ask for an extension. The **SpryPoint** Project Manager will evaluate any timeline extensions against the project schedule and communicate if the extension puts the project schedule at risk.

2.9.4. Agreed Priority Definitions

During the implementation the following definition will be used to define the priority of issues

- **Priority 1 (Critical)** – A critical business function is not functioning correctly or is not available. Manual processes or other alternatives are not possible. Continued functionality of related downstream processes is not possible, as the downstream business functions will also be severely affected. i.e., the business cannot function
- **Priority 2 (High)** – A critical business function is not functioning correctly or is severely impaired. Manual processes or other alternatives are possible but may not be practical. Continued processing of related downstream business process may be possible without extending the error to downstream business functions.
- **Priority 3 (Medium)** – A non-critical business function is not functioning correctly or is severely impaired. Manual processes or other alternatives are possible. Continued process of related downstream business process may be possible without extending the error to downstream business functions.
- **Priority 4 (Low)** – A nice to have or an issue that has minimal impact to the general customer population or that affect individual users.

2.9.5. Milestone Acceptance Process

This project will be invoiced on a milestone basis. The milestones, delivery criteria and payment timelines are noted below and in Exhibit G - Milestones.

On a monthly basis, the **SpryPoint** Project Manager will submit a list of milestones that have been completed for review and approval to the **Client** Project Manager. Service

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deliverables shall be accepted or rejected within 5 consecutive business days from the time of submission for acceptance. Service deliverables will be considered accepted with written approval from the **Client**. In the event the **Client** does not provide written approval or feedback within the agreed upon time period **SpryPoint** may invoice the milestone. The use or partial use of any service deliverable in a Production Environment constitutes acceptance of that service deliverable but only to the extent of such use or partial use.

The Service Deliverable Acceptance Process is described below.

- **Submission of Service Deliverables**. The **SpryPoint** Project Manager, or his or her designee, will prepare a list of completed milestones and forward with the respective service deliverable to the **Client** Project Manager, or the **Client** designee, for consideration.
- **Assessment of Service Deliverables**. The **Client's** Project Manager will determine whether the service deliverable meets the requirements as defined in this SOW and that the service deliverable is complete.

Acceptance / Rejection. After reviewing, the **Client** will either; accept the service deliverable in writing or will provide a written reason for rejecting it to the **SpryPoint** Project Manager. If the Milestone is accepted, the **SpryPoint** Project Manager will invoice for the Milestone(s). If the Milestone is rejected the **SpryPoint** Project Manager will review the reason and work with the **Client's** Project Manager to determine if the rejected reason is within scope and if so, resolve any concerns. Once concerns are addressed the Milestone Acceptance Form will be updated and resubmitted for approval in the next month invoicing cycle.

2.9.6. Scope & Project Change Management

During implementation either party may request additions, deletions, or modifications to the services or software described in this SOW (“change”). All changes will be documented and approved, regardless of if there is a cost associated with the change or not.

Request for changes should be made to either project team’s project manager. The **SpryPoint** Project Manager, who will create a Change Order. The change order will outline the following:

- Describe the problem that needs to be solved or the scope change to be addressed
- Describe the solution to the problem or scope change being requested, including the use/business case and/or reason for the change and suggested solution
- Estimated impact of the change on the project schedule
- If applicable, any fees/cost and expenses associated the change

The Change Order Process that will be employed is defined below. The change order must be approved by both **SpryPoint** and the **Client** before any work related to this change order is completed.

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- Identify the requested change
- Identify and document the solution and scope of work associated with the change request
- Estimate required effort, and any associated costs
- Assess impact of change on schedule, travel fees, milestones, contract, risks and/or any other identified impacts.
- Submit for review and approval by **Client** and **SpryPoint** Management Team
- If not approved, no changes are completed and the change request is canceled
- If approved project documents are updated and work on the request is scheduled into the project.
- Monitor and report progress
- Communicate change resolution

During the implementation, work to execute the approved project change orders will be completed at a price of $200 USD per hour.

2.9.7. Issues and Risk Management

The following procedure will be used to manage Project issues and risks:

- Identify and document
- Assess impact and prioritize
- Assign responsibility
- Monitor and report progress
- Communicate issue resolution

On a monthly basis, the Project Managers will meet, to review the status of the risks and outstanding issues. When a risk is identified each risk will be assessed for probability and impact and weighted.

2.9.8. Conflict Resolution and Escalation Process

While both parties agree it is the desire to resolve issues quickly and within the project team(s), at times this may not be possible, and issue(s) may need to be escalated to resolve. Note a project issue can include anything from a business process change to a schedule issue to a personnel issue. The following table shows the escalation path:

Escalation Path	SpryPoint	Client
Level 4	Chief Customer Officer (CCO)	Executive Sponsor
Level 3	Executive Sponsor	Project Manager
Level 2	Project Manager	Project Manager
Level 1	Implementation Specialist	Core Team Members

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2.9.9. Project Working Times

2.9.9.1. Project Working Schedule

During the project implementation it has been agreed that Project Meetings, Training Sessions will be complete Monday through Friday when working remotely. If work is being completed onsite meeting times will be scheduled between Tuesday through Thursday, with Monday and Friday being travel days for **SpryPoint** staff. In the event scheduled project activities such as meeting, training sessions, etc. need to be completed on days/times outside the above agreed times, this will be mutually agreed upon by both parties and scheduled a minimum of three (3) weeks in advance.

2.9.9.2. Statutory Holidays

It is agreed that both parties will do their best to respect each party's holiday schedule. However, depending on where the project is and go live date, on occasion project team members may be required to work a statutory holiday. If this is to occur, it will be mutually agreed to by both parties.

SpryPoint Observed Holidays

*** Note: this calendar is subject to change based on company policies*

Holiday	2025	2026	2027
New Year's Day	January 1	January 1	January 1
Islander Day/Family Day (Canadian)	February 17	February 16	February 15
Good Friday	April 18	April 3	March 26
Victoria Day (Canadian)	May 19	May 18	May 24
Canada Day	July 1	July 1	July 1
Civic Holiday (Canadian)	August 4	August 3	August 2
Labor Day	September 1	September 7	September 6
National Day of Truth &	September 30	September 30	September 30

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Reconciliation (Canadian)			
Thanksgiving (Canadian)	October 13	October 12	October 11
Remembrance Day (Canadian)	November 11	November 11	November 11
Christmas Day	December 25	December 25	December 25
Boxing Day (Canadian)	December 26	December 26	December 26

Client Observed Holidays

Holiday	2025	2026	2027
New Year's Day	January 1	January 1	January 1
MLK Day	January 20	January 19	January 18
President's Day	February 17	February 16	February 15
Memorial Day	May 26	May 25	May 31
Juneteenth	June 19	June 19	June 19
Independence Day	July 4	July 3 (Observed)	July 5 (Observed)
Labor Day	September 1	September 7	September 6
Columbus Day	October 13	October 13	October 13
Veterans Day	November 11	November 11	November 11
Thanksgiving	November 27 & 28	November 26 & 27	November 25 & 26
Christmas Day	December 25	December 25	December 25

*** Note: this calendar is subject to change based on company policies*

2.9.10. Executive Committee

The Executive Committee Meeting will include **SpryPoint** and **Client** Project Manager and Project Sponsors. This review will take place monthly via a zoom meeting or onsite (if mutually agreed to by both parties). The intent of this meeting is to ensure that the project is on-time and on-budget, and that Executive Management for both parties have a clear

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understanding of project status. The primary tool that will be used to do the meeting is the latest month's Monthly Project Status Report. The intended level of attention to detail during this meeting is to identify areas of concern or material change to the project. Topics of discussion include:

- Work accomplishments from the previous month and planned work accomplishes for the upcoming month
- The percent complete for the overall project thus far. Descriptions of any material variances in schedule or work will be provided; if the percent complete is different than what was expected from the prior month.
- The current Risk Management Plan will be included, and risk status will be reviewed, based on priority of risks.
- The Project Plan will be included and reviewed for any areas of concern or material change to the project.

2.9.11. Project Management Reoccurring Deliverables

During the project implementation the **SpryPoint** Project Manager is accountable for the delivery of the following reoccurring deliverables

Communication Method	Description
Shared Project Folders	Via the used of Google Drive, **SpryPoint** will provide the **Client** with a shared project folder for document sharing and collaboration of documents during the project.
Project Status Reports	A monthly report that outlines summarize project status, upcoming activities, risks, etc.
Updates to the project plan	Updates to the baseline Project schedule are performed and published bi-monthly. The plan is updated to refine tasks, percent complete and milestone completions, inclusive of resource updates and timeframe updates. Both parties will commit to staffing and resources to meet a rolling 3-month window. Note: project plans will be maintained and update in the **SpryPoint** Project Tool, called Wrike. Access can be granted to the **Client** to see the project plan.
Risk Log	Report that lists risks, probability, impact, status, and responsible resource.
Executive Committee	A monthly meeting to ensure both Executive Teams understand project status, any risks, and an opportunity to discuss any other topics as required
Issue Log	Report that lists project issues, responsible resource, due date, priority, and impact on critical path.

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2.9.12. Project Completion

The project will be considered complete when any of the following are met:

1. All of the service deliverables identified within this SOW have been completed, delivered, and accepted or deemed accepted, including approved Change Order Forms.
2. The fee provisions of the contract have been met; or
3. This agreement is terminated pursuant to the provisions of the contract.
4. If client is using the system in a production environment for longer than 6 months with no written documentation of issues related to the scope included in this SOW.

Once a project is deemed complete any outstanding implementation fees are due.

2.9.13. Retainage Collection

Retainage will be applied to each invoice during the project as per the Exhibit A to the Master Subscription Agreement. The retained amounts will be invoiced by SpryPoint and is to be released by Client based on the following criteria:

- 50% release of retainage upon successful completion of Go Live as defined in section 2,7.4
- 25% released upon the competition of the Transition to Customer Success as noted in section 2.8.1
- 25% on Project Close Out as noted in section 2.8.2

3. Integrations & Enhancements

This section outlines any of the integrations or enhancements included in the scope of work. It is important to note that during analysis and throughout the implementation there maybe additional integrations or enhancements identified. In this event, **SpryPoint** will provide ballpark estimate(s) to determine if further investigation or detail(s) is required. If the **Client** is not interested, **SpryPoint** will work with the **Client** to ensure they understand all required workarounds. If the **Client** wishes to investigate further, a full estimate will be provided. If the change is deemed required, the change order process will be activated.

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3.1. Integrations

SpryPoint products are designed with REST Application Programming Interfaces (API's) to enable real-time integration. For inbound integration and synchronization from back-office applications, we provide a purpose-built back- office integration Application Programming Interface (API). For outbound integration, we have an integrated process scheduler as well as an extensible event framework to support both batch and scheduled integrations as well as event-driven integrations.

Note: In the event additional work or development is required to support integrations with third party applications and **SpryPoint**, it is outside the scope of this project. Some examples are configuration in third party application, the need for a third party to add information to an API, etc.

No.	Integration Name	Integration Details
1.	ESRI GIS (ArcGIS)	Asset data from Esri will be visible in SpryMobile per the standard Esri integration for use in asset management and work order planning and execution. Some WAMS data (e.g. link to the asset details page) to be shared back to Esri via configured payload in a bidirectional integration (limited bidirectional integration), but asset attribute data not updated in Esri via SpryMobile. SpryMobile to include standard Esri ArcGIS integration capabilities. These capabilities include: · Administrators may configure SpryMobile to connect to ArcGIS web services using basic or OAuth 2.0 authentication. · Administrators may display layers from ArcGIS web services (Feature Services, Map Services and Image Services) directly within the SpryPoint applications. These layers are overlaid on maps and easily toggled on or off. This allows users of SpryMobile to view their infrastructure components, to pan, zoom, search and select, and ultimately perform operations by location and proximity to drive their workflows. Attribute data that describes various infrastructure components is pulled from the customer's GIS through these services for display on maps.

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No.	Integration Name	Integration Details
		SpryMobile supports the automatic update of SpryMobile asset records when new assets are created or updated in ArcGIS Enterprise. This is only supported on work orders and asset management.
2.	Workday (Inventory)	The inventory items will go through the requisition and purchase process in Workday, which will serve as the system of record for "consumable assets." SpryMobile will function as the system of engagement for updating inventory levels in Workday based on work orders. Capitalized Assets (Defined as “Assets” in SpryMobile) are found in both the GIS and Workday; these "Assets" will be synchronized with SpryMobile if required for the purpose of work order creation; select asset classes without work done against them can be excluded from the sync payload. Consumable assets (Defined as "Service Items” or "Materials" in SpryMobile) exist in Workday within the inventory and are synchronized to Mobile via the integration sync. SpryMobile will receive a nightly sync of the master list of available service items and send inventory updates to Workday, indicating which service items / materials were used and the quantities consumed. This integration will be done through the Workday API. The process involves sending defined parameters to Workday upon the completion of a work order. There will be no bi-directional communication; we will only provide updates concerning those service items from Workday's provided list upon completion of the work order. A distinction between “field complete” and “complete” will be made in consultation with the client. The above integration presumes integration via Workday API.

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No.	Integration Name	Integration Details
3.	Workday (Projects & Job Costing)	The integration between SpryMobile and Workday will update work orders in Workday with defined project codes and relevant parameters needed for Workday to calculate project costs. Integration Details: • SpryMobile will facilitate the transfer of project codes and job costing information using work order tags and include these in the payloads to Workday. • Allowable project codes will be synchronized from Workday to ensure consistency and compliance. • Upon work order completion, SpryMobile will send the required attributes for project categorization and job costing (personnel and equipment time, inventory items, fees and standard cost labor) to Workday. • The finalized list of attributes to be synchronized will be determined during the implementation phase. This integration will be implemented using the Workday API. If changes to these requirements occur, SpryPoint will need to rescope the integration.
4.	SSO (Active Directory)	SpryMobile will be registered as an Enterprise Application in Azure Active Directory (Azure AD) to support two primary functions: Provisioning SpryMobile users through AD, and to authenticate to SpryMobile via AD Single Sign On (SSO).

3.2. Enhancements

SpryPoint will create an Enhancement Requirements Document for each enhancement to define the detailed requirements.

No.	Enhancement Details
1.	None Identified

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4. Project Assumptions

The following project assumptions apply to this project:

4.1. General Assumptions

1. **Client** will strive to minimize the impact of competing initiatives within the organization that may have a negative impact to the Project.
2. SpryPoint will provide a Team with prior proven expertise and experience with successfully implementing the proposed solutions
3. All prices are quoted in US Dollars and do not include any applicable taxes.
4. Prompt decision-making and problem resolution will be required to achieve an on-time, on-budget project completion.
5. **Client** and SpryPoint understand the project scope and project timelines and agree to communicate and adhere to those objectives, thus setting the proper expectation level.
6. All changes to the SOW shall be managed in accordance with the Agreed upon Change Order process.
7. The **Client** will make resources available to support data extraction, data mapping, and preliminary data validation during the conversion efforts. Client is responsible for data extraction from legacy systems, however, **SpryPoint** will work together with the **Client** to support data export activities as needed.
8. **SpryPoint** will be responsible for the import of **Client** provided legacy data into SpryMobile WAMS. It should be noted that while **SpryPoint** is responsible for loading of data, the **Client** must provide user(s) who understand how the **Client** currently uses the system and to complete data extraction and to work with SpryPoint on transformation activities.
9. **SpryPoint** will provide the specified number of staff, as described in the detailed project schedule and the staffing matrix, with the appropriate skills and experience to lead each workshop, analytical session, or other review activities, whether onsite or conducted remotely.
10. If on-site activity is required, The Client will provide workspace for each **SpryPoint** consultant. Breakout and conference space will also be provided if required.
11. If training is completed on-site, adequate training space will be provided by the **Client** to train end users. The training room(s) will include computers for each end-user being trained.
12. The **Client** will ensure Project Team members are available for meetings, workshops, discussions, and conference calls upon request by **SpryPoint**.

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Project Team members will respond to information requests by **SpryPoint** staff.

13. Whenever possible, the Project Team may consider alternative meeting options such as Zoom and Conference Calls.
14. Both parties agree to work a reasonable number of added hours (when required) to help complete project deliverables and project timelines as agreed upon by both Project Managers.
15. **SpryPoint** will assume responsibility for the successful completion of this SOW.
16. **SpryPoint** will assume overall responsibility for conducting all project related administration activities including the development and administration of a work plan that clearly indicates all **Client** tasks and responsibilities.
17. **SpryPoint** is responsible for the initial deployment, configuration, and testing of environments of the system to support training, development, testing, etc.
18. **Client** is willing to implement **SpryPoint** "Best Practices" to minimize the need for software customizations.

4.2. Data Conversion Assumptions

1. **SpryPoint** will review Client file layouts and data descriptions. The mapping of source data to the target environment will be accomplished through a joint **SpryPoint** and **Client** workshop.

- **Client** will assign individual(s) to assist with data validation.
- **SpryPoint** will lead the import of **Client** extracted data into SpryMobile.

4.3. Development Assumptions

1. **SpryPoint** is responsible for all enhancements to the system.
2. **SpryPoint** will take the lead and be responsible for the development of interfaces and enhancements, modifications,
3. **Client** will provide subject matter experts for the legacy system as required to support the design, development, and testing of interfaces against other systems.
4. **Client** will lead all interactions with 3rd parties related to the integration and overall delivery of the final solution. **SpryPoint** will provide sufficient lead time for asks of 3rd parties. For this point, sufficient will be a minimum of 5 business days. If a vendor requires longer lead times the **Client** is responsible to document this and provide the minimum lead time to **SpryPoint**. Significant lead times to work with vendors could result in project delays.
5. **SpryPoint** will be responsible for performing quality assurance of all enhancements, interfaces, reports, and workflows prior to their delivery to the **Client** for user testing and acceptance.

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4.4. System Testing Assumptions

1. SpryPoint and Client will jointly develop all test plans outlining the testing approach, methods, data, and participants.
2. Client will review, participate, and complete testing activities under the direction of SpryPoint as outlined in the sections above in this document.
3. SpryPoint will provide resources for product fixes resulting from errors identified during the system testing process.
4. SpryPoint will deliver the completed SpryPoint Service to Client for review and acceptance.
5. Client will be responsible to sign off on testing results.

4.5. Training Assumptions

1. **Client** is responsible for prerequisite education and training such as basic PC skills and fundamental business process knowledge.
2. **SpryPoint** will provide standard training materials. **Client** may use these training materials for any subsequent training classes.
3. **Client** will provide users with specific times to participate in required training.
4. **Client** has the facilities and will provide the necessary logistics support for all training sessions which if required may include training room, training workstations, and any other necessary training supplies.
5. **Client** will ensure end-user attendance during training.
6. **Client** will schedule and ensure clients practice use of the system after training is completed.

4.6. Production Readiness and Cutover Assumptions

1. **Client** will be responsible for conducting an acceptance test of the completed system as delivered by **SpryPoint** at the completion of testing activities.
2. **SpryPoint**, with assistance of **Client**, will develop a mutual agreement regarding the go-live plan and schedule.
3. **SpryPoint**, with assistance of **Client**, will stage all aspects of the system in preparation for production cutover.
4. **SpryPoint**, with assistance of **Client**, will conduct production cutover activities.

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5. Appendixes

5.1. Definitions

In addition to the definitions contained elsewhere in this SOW, the terms in the table below are defined using the associated descriptions.

Definition/Term Name	Definition/Term Description
Acceptance Testing	Acceptance testing is Client's validation to ensure top-to-bottom functional stability and adherence to existing business requirements and business processes. Testing will be in several phases, including, but not limited to, functional testing, integration testing, and performance testing.
Acceptance	Acceptance is defined as information, documentation, development, or any other object(s) approved and signed off by client
Agreement Date	The date in which both Client and SpryPoint agree to terms and execute the Master Agreement.
Business Day	One regular workday (Monday through Friday – non-holidays or emergency days) as defined by the Client's business calendar.
Business Process	A defined series of procedures that will identify and document process steps and system transactions. Business Process documentation can be used to facilitate testing and training.
Bi-Monthly	The activity will happen every other week
Bi-Weekly	This activity will happen twice a week
Calendar Day/Days	A 24-hour period–typically starting at midnight.
Change Order	All changes to the SOW must be agreed upon by the parties and evidenced in a written instrument signed by the parties' authorized representatives.
Change Order Process	The process used when a change of scope is identified. This process may or may not have monetary costs associated with it.
Configuration	Process of performing table updates and algorithm changes to the system to have the system perform Client's specific user requirements. Configuration does not require programmatic software changes.
Courseware	End-User Training Materials that will be developed to facilitate end-user training execution.
Cut Over	Includes all activities required to prepare the systems for the transition of the new SpryPoint CIS Solution to production processing. The activities will include ensuring security setup,

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	establishing user profiles, closing out pending data in the legacy system, manual data conversions when required, system access rollout to end users, and other activities SpryPoint and Client deem necessary.
Data Acceptance Testing (DAT)	Testing performed by the client Data Owners and Key Users after each Data Conversion iteration. During DAT, the client not only verifies the data migrated, but also validates that the data may be inquired and reported upon. This can be done through a variety of queries, reports and visual confirmation.
Data Mapping	The process of assigning source system data elements to target data elements in the system data model for purpose of import.
Data Model	Conceptual description of data objects, their attributes, and the relationships between them.
Delivery	Defined as information, documentation or object approved provided to the client for review, feedback and/or acceptance.
Enhancement	Enhancements to the base solution that is added to the core code to meet a defined Client requirement. This does not include configuration changes of any form.
Enhancement Testing	Stand-alone testing of the system enhancements, performed during development, by the SpryPoint developers and Implementation specialists.
Functional Test	Singular test of an object, such as a screen, report, or batch program. These tests will focus on specific functions.
Interface	Passing of data between two separate and distinct systems; can be accomplished in real-time or batch mode.
Integration Test	The integration testing will utilize formal test plans and scripts that will define how to test a singular feature and business process based on pre-defined expected results. Integration tests are formal in nature, cover multiple scenarios of a feature and process, and are based on the variations of Client's business.
Organizational Change Management (OCM)	The activities, events, processes, and procedures that are employed for handling transformation from one system environment to another; this relates mainly to the people and business processes.
Performance Testing	This testing will exercise the system to ensure Client will achieve the stated performance goals.
Price	The total cost for implementation & expenses to deliver the SpryPoint Solution as noted in this SOW and other Exhibits to the Agreement.
Quality Assurance	The process of verifying that the proper processes and procedures have been adhered to on the project from a methodology as well as project management perspective and that the deliverables produced on the project have included the appropriate content and meet expectations.

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Script Testing	Testing using a pre-determined script or set of instructions. Testing can be either manual or automated work.
SpryPoint Service	The SpryPoint Service includes all services as defined in this Statement of Work for products sold as part of this contract.
Templates	Templates refer to the standard format of various project documents that SpryPoint will provide as a starting point and will modified to address the specifics of this project. Examples include Training Plan, Test Plan, Conversion Plan, etc....
Test Scripts	A series of actions, functions, scenarios, or commands documented for execution during various phases of testing.
User Acceptance Test	Final testing led by the client, where SpryPoint is available for assistance as required. This testing is typically scenario based and ensures that the system is configured to meet all of agreed upon business processes.

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5.2. Milestone Schedule

No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
1	Project Management	PM 1	PM activities per the SOW - Due upon completion of Project Kick Off	$18,400	$920	$17,480	-
2	Project Management	PM 2	PM activities per the SOW - Due upon completion of Analysis Phase	$18,400	$920	$17,480	-
3	Project Management	PM 3	PM activities per the SOW - Due upon completion of Configuration Phase	$18,400	$920	$17,480	-
4	Project Management	PM 4	PM activities per the SOW - Due upon completion of Test Phase	$18,400	$920	$17,480	-
5	Project Management	PM 5	PM activities per the SOW - Due upon completion of Go-Live	$18,400	$920	$17,480	-

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
6	Analysis	Project Kickoff	Complete the following Deliverables: - Mobilize Project Team - Conduct Project Kickoff - Prepare project infrastructure - Detailed Analysis Workshop schedule complete - Staging & production environments setup with one Client - System overview	$800	$40	$760	P11, PI3, P14, PI5, PI6, PI7, A1
7	Analysis	Analysis Workshops - WAMS (Assets)	Complete the following deliverables: -Complete Assets Analysis Workshops -Complete upon client review/confirmation	$8,000	$400	$7,600	A2, A3
8	Analysis	Analysis Workshops - WAMS (Work Orders)	Complete the following deliverables: -Complete Work Orders Analysis Workshops -Complete upon client review/confirmation	$3,200	$160	$3,040	A2, A3

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
9	Analysis	Analysis Workshops - Reporting & Integrations	Complete the following deliverables: -Complete Reporting and Integrations Analysis Workshops -Complete upon client review/confirmation	$800	$40	$760	A2, A3
10	Analysis	Analysis Report Signoff	Complete the following deliverables: - Analysis Report Delivery Analysis Report Updates - Analysis Report Review & Approval	$4,800	$240	$4,560	A4, A5
11	Configuration	Data Extraction Assistance	Complete the following deliverables: - Data Extraction from legacy system complete	$8,000	$400	$7,600	C6
12	Configuration	Data Mapping & Import	Complete the following deliverables: -Initial completion of data mapping workbook & import assistance - Data validation report - Complete upon client review/confirmation	$14,400	$720	$13,680	C7

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
13	Configuration	WAMS Configuration 1	Complete the following deliverables: - Initial setup decisions in configuration Workbook - Initial configuration in Staging environment ready for client testing - Complete upon client review/confirmation	$40,000	$2,000	$38,000	C1, C2
14	Configuration	WAMS Configuration 2	Complete the following deliverables: - Final setup decisions in configuration Workbook - Final configuration in Staging and ready for client testing - Complete upon client review/confirmation	$40,000	$2,000	$38,000	C1, C2, C4
15	Configuration	Work Orders Configuration	Complete the following deliverables: - Final configuration complete - Work Orders - Complete upon client review/confirmation	$24,000	$1,200	$22,800	C1, C2

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
16	Configuration	Report Development	Complete the following deliverables: - Report configuration per the SOW - Complete upon client review/confirmation	$4,800	$240	$4,560	C1, C3
17	Configuration	KPI & Dashboard	Complete the following deliverables: - Out of the box reports & dashboards in staging environment - Review out of the box report & dashboards with client	$4,800	$240	$4,560	C1, C3
18	Configuration	Core Team Training	Complete the following deliverables: - Training of core team members to use SpryPoint solution	$3,200	$160	$3,040	C5
19	Deploy	End User Training	Complete the following deliverables: - Training of end users to use SpryPoint solution	$16,000	$800	$15,200	D7

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
20	Configuration	Integration - ESRI GIS	Complete the following deliverables: Integration in staging environment and ready for testing	$8,000	$400	$7,600	C1, C8
21	Configuration	Integration - SSO (Active Directory)	Complete the following deliverables: Integration in staging environment and ready for testing	$3,200	$160	$3,040	C1, C8
22	Configuration	Integration - Workday (Inventory)	Complete the following deliverables: Integration in staging environment and ready for testing	$8,000	$400	$7,600	C1, C8
23	Configuration	Integration - Workday (Projects & Job Costing)	Complete the following deliverables: Integration in staging environment and ready for testing	$16,000	$800	$15,200	C1, C8
24	Test	Functional Testing	Complete the following deliverables: - Execute Functional Testing - Functional Testing Signoff	$16,000	$800	$15,200	C9, T1

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
25	Test	Integration Testing	Complete the following deliverables: - Execute Integration Testing - Functional Testing Signoff	$8,000	$400	$7,600	T3
26	Test	User Acceptance Testing	Complete the following deliverables: - Execute User Acceptance Testing - User Acceptance Testing Signoff	$8,000	$400	$7,600	T2
27	Deploy	Mock Cutover #1	Complete the following deliverables: - Mock Go-Live Plan provided to client for review - Mock Go- Live Scheduled	$4,800	$240	$4,560	D1
28	Deploy	Mock Cutover #2	Complete the following deliverables: - Mock Go-Live Successfully Executed - Mock Go Live Signoff	$4,800	$240	$4,560	D1

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No.	Phase	Milestone Name	Milestone Description	Milestone Amt	Retainage Amount	Invoice Amt	Deliverable No.
29	Deploy	Go-Live	Complete the following deliverables: - Go Live Plan Developed - Go/No Go Decision - Go Live Activities Completed - SpryPoint - Go Live Signoff	$16,000	$800	$15,200	D2, D3, D4, D5, D6
30	Post Go-Live Support & Stabilization (Month #1)	Post Go Live Support	Post Go-Live Support & Stabilization (Month #1)	$24,000	$1,200	$22,800	01, 02, 03, 04, 07
31	Post Go-Live Support & Stabilization (Month #2)	Post Go Live Support	Post Go-Live Support & Stabilization (Month #2)	$8,000	$400	$7,600	O7
32	Post Go-live Support & Stabilization (Month #3)	Post Go Live Support	Post Go-Live Support & Stabilization (Month #3)	$3,200	$160	$3,040	05, 06, O7
TOTAL				**$392,800**	**$19,640**	**$373,160**	

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IDAHO FALLS FUNCTIONAL REQUIREMENTS - WO / ASSET MANAGEMENT

VENDOR: Strada / Workday, Inc. / Sprypoint

Req ID	Functional Group	Topic	Requirement	Vendor Response	Vendor Narrative or Additional Comments	
WOM.WO.1	Work Management	*Work Management*	System must have the ability to track multiple work orders within a project	1 – Current Functionality		
WOM.WO.2	Work Management	*Work Management*	System has the ability to flag projects as billable	1 – Current Functionality		
WOM.WO.3	Work Management	*Work Management*	System must have the ability to support work orders and work requests including:			
WOM.WO.4	Work Management	*Work Management*	a) Work order number	1 – Current Functionality		
WOM.WO.5	Work Management	*Work Management*	b) Work order status	1 – Current Functionality		
WOM.WO.6	Work Management	*Work Management*	c) Priority	1 – Current Functionality		
WOM.WO.7	Work Management	*Work Management*	d) Project number	1 – Current Functionality		
WOM.WO.8	Work Management	*Work Management*	e) Division or Group	1 – Current Functionality		
WOM.WO.9	Work Management	*Work Management*	f) Work order department	1 – Current Functionality		
WOM.WO.10	Work Management	*Work Management*	g) System initiating work order (CIS or EAM)	1 – Current Functionality		
WOM.WO.11	Work Management	*Work Management*	h) Address	1 – Current Functionality		
WOM.WO.12	Work Management	*Work Management*	i) CIS Premises Number	1 – Current Functionality		
WOM.WO.13	Work Management	*Work Management*	j) Work Order Creation Date	1 – Current Functionality		
WOM.WO.14	Work Management	*Work Management*	k) Requested Start Date	1 – Current Functionality		
WOM.WO.15	Work Management	*Work Management*	l) Requested Completion Date	1 – Current Functionality		
WOM.WO.16	Work Management	*Work Management*	m) Scheduled Start Date	1 – Current Functionality		
WOM.WO.17	Work Management	*Work Management*	n) Actual Start Date	1 – Current Functionality		
WOM.WO.18	Work Management	*Work Management*	o) Actual Completion Date	1 – Current Functionality		
WOM.WO.19	Work Management	*Work Management*	p) Contract / Bid Number	1 – Current Functionality		
WOM.WO.20	Work Management	*Work Management*	q) GIS Asset Number, Location-ID, etc.	1 – Current Functionality		
WOM.WO.21	Work Management	*Work Management*	r) Loop Number	1 – Current Functionality		
WOM.WO.22	Work Management	*Work Management*	s) Circuit Number	1 – Current Functionality		
WOM.WO.23	Work Management	*Work Management*	t) Transformer Number	1 – Current Functionality		
WOM.WO.24	Work Management	*Work Management*	u) Feeder Number	1 – Current Functionality		
WOM.WO.25	Work Management	*Work Management*	v) Pole Number	1 – Current Functionality		
WOM.WO.26	Work Management	*Work Management*	w) Capacitor Bank Number	1 – Current Functionality		
WOM.WO.27	Work Management	*Work Management*	x) Proposed Load			
WOM.WO.28	Work Management	*Work Management*	y) Proposed Secondary Voltage	1 – Current Functionality		
WOM.WO.29	Work Management	*Work Management*	z) Customer / Contact Name(s)	1 – Current Functionality		
WOM.WO.30	Work Management	*Work Management*	aa) Contact Phone Numbers(s)	1 – Current Functionality		
WOM.WO.31	Work Management	*Work Management*	bb) Description of Work Requested	1 – Current Functionality		
WOM.WO.32	Work Management	*Work Management*	cc) Crew Type	1 – Current Functionality		
WOM.WO.33	Work Management	*Work Management*	dd) Special Hazards	1 – Current Functionality		
WOM.WO.34	Work Management	*Work Management*	ee) Coordinates	1 – Current Functionality		
WOM.WO.35	Work Management	*Work Management*	ff) Description of Work Completed	1 – Current Functionality		
WOM.WO.36	Work Management	*Work Management*	gg) Condition Upon Arrival	1 – Current Functionality		
WOM.WO.37	Work Management	*Work Management*	hh) Reason for Outage	1 – Current Functionality		
WOM.WO.38	Work Management	*Work Management*	ii) Planner / Engineer	1 – Current Functionality		
WOM.WO.39	Work Management	*Work Management*	jj) Inspector	1 – Current Functionality		
WOM.WO.40	Work Management	*Work Management*	kk) Field Supervisors	1 – Current Functionality		
WOM.WO.41	Work Management	*Work Management*	ll) User Defined Fields	1 – Current Functionality		
WOM.WO.42	Work Management	*Work Management*	mm) Permit Number	1 – Current Functionality		
WOM.WO.43	Work Management	*Work Management*	nn) Facilities ID Number	1 – Current Functionality		
WOM.WO.44	Work Management	*Work Management*	oo) Asset Number	1 – Current Functionality		
WOM.WO.45	Work Management	*Work Management*	pp) Regulatory asset (Y/N)	1 – Current Functionality		
WOM.WO.46	Work Management	*Work Management*	qq) Updated by	1 – Current Functionality		
WOM.WO.47	Work Management	*Work Management*	rr) Completed by	1 – Current Functionality		
WOM.WO.48	Work Management	*Work Management*	System has the ability to capture audit trail information on all transactions (e.g., user, date, and time stamp)?	1 – Current Functionality		
WOM.WO.49	Work Management	*Work Management*	System has the ability to default a work order number to a work request number	1 – Current Functionality		
WOM.WO.50	Work Management	*Work Management*	System must have the ability to interface with the other modules within the packaged solution	1 – Current Functionality	API is our preferred method.	
WOM.WO.51	Work Management	*Work Management*	System has the ability to link to other internal and/or external sources including Microsoft Office Products and 3rd party software design software	1 – Current Functionality	Word and Excel are available out of the box. Additional information needed regarding other third-party products.	
WOM.WO.52	Work Management	*Work Management*	System has the ability to automatically assign a unique alphanumeric or numeric work order number	1 – Current Functionality		
WOM.WO.53	Work Management	*Work Management*	System has the ability to create an alert on any work order dealing with a part or asset that has a MSDS attached	1 – Current Functionality		
WOM.WO.54	Work Management	*Work Management*	System has the ability to import work orders from MS Excel, .csv, .txt files, etc.	1 – Current Functionality		
WOM.WO.55	Work Management	*Work Management*	System has the ability to cross-reference new work orders with existing work orders	1 – Current Functionality		
WOM.WO.56	Work Management	*Work Management*	System has the ability to add attachments to work orders	1 – Current Functionality		
WOM.WO.57	Work Management	*Work Management*	System has the ability to cancel a work request or work order	1 – Current Functionality		
WOM.WO.58	Work Management	*Work Management*	System has the ability to provide work flow capabilities including work request and/or work order approval and status updates based upon work order type, user id, or user group	1 – Current Functionality		
WOM.WO.59	Work Management	*Work Management*	System has the ability to identify a work order as billable with automatic forwarding to the appropriate department for invoice creation	4 – Modification Required	An enhancement is required for this functionality.	MUST INCLUDE EXPLANATION & COST ESTIMATION
WOM.WO.60	Work Management	*Work Management*	System has the ability to track groups of unscheduled work as "fill-in as available" tasks (e.g.,certain PM, meter change outs, meter tests, reads on AMI's)	1 – Current Functionality		
WOM.WO.61	Work Management	*Work Management*	System has the ability to track deadlines for unscheduled work at which time tasks are moved from "fill-in as available" to "required" (e.g., maintenance tasks that can be done anytime in a 6 month window, but have to be completed by the end of the window)	1 – Current Functionality		
WOM.WO.62	Work Management	*Work Management*	System has the ability to track fill-in work by location	1 – Current Functionality		
WOM.WO.63	Work Management	*Work Management*	System has the ability to revise/update a work order and alert the change to the assigned crew and/or supervisor	1 – Current Functionality		
WOM.WO.64	Work Management	*Work Management*	System has the ability to attach multiple contacts to a work order	1 – Current Functionality		
WOM.WO.65	Work Management	*Work Management*	System has the ability to drill down to and view all contacts attached to a work order	4 – Modification Required	An enhancement is required for this functionality.	MUST INCLUDE EXPLANATION & COST ESTIMATION
WOM.WO.66	Work Management	*Work Management*	System has the ability to update inspections information of a work order and track sign-off(s)	1 – Current Functionality		
WOM.WO.67	Work Management	*Work Management*	System has the ability to track date requested for an event or step on a work order	1 – Current Functionality		
WOM.WO.68	Work Management	*Work Management*	System has the ability to flag a work order as pending with reason pending	1 – Current Functionality		
WOM.WO.69	Work Management	*Work Management*	System has the ability to track and verify that all prerequisites have been met including materials available, permits, and other support activities	1 – Current Functionality		
WOM.WO.70	Work Management	*Work Management*	Does your product have the ability to schedule recurring work with alerts to notify staff (e.g., Cyclical regulatory inspection)?	1 – Current Functionality		
WOM.WO.71	Work Management	*Work Management*	Does your product have the ability to interface the above information to the accounts payable, accounts receivable, inventory, general ledger, CIS, GIS, etc.?	1 – Current Functionality	Please note that all SpryPoint applications are built API first and we have the ability to interface with these modules as needed. Additional information is required to identify the exact scope and touch point of the integrations to price accurately.	
WOM.WO.72	Work Management	*Work Management*	Does your product have the ability to charge utility owned equipment to a work order in 2 decimal increments using standard or average costing?	1 – Current Functionality	Item and equipment charges may be applied to a work order, but are only available with standard costing. Adding other costing methods would require an enhancement.	
WOM.WO.73	Work Management	*Work Management*	System has the ability to track status of job aging and to terminate the job with proper approval	1 – Current Functionality		
WOM.WO.74	Work Management	*Work Management*	System has the ability to generate a new W/O (child) for work not completed	1 – Current Functionality		
WOM.WO.75	Work Management	*Work Management*	System has the ability to identify the difference between install / remove of an asset and a swap / change out of an asset	1 – Current Functionality		
WOM.WO.76	Work Management	*Work Management*	System has the ability to identify all the assets that have been associated with a location and when those assets were associated	1 – Current Functionality		
WOM.AM.1	Asset Management	*General Requirements*	Ability of system to track the following, but not limited to :			
WOM.AM.2	Asset Management	*General Requirements*	a) Capitalized items	1 – Current Functionality	Asset tagging	
WOM.AM.3	Asset Management	*General Requirements*	b) Non-capitalized items	1 – Current Functionality	Asset tagging	
WOM.AM.4	Asset Management	*General Requirements*	c) Asset used at customer site	1 – Current Functionality	Asset tagging	
WOM.AM.5	Asset Management	*General Requirements*	Ability of system to identify fixed asset, based upon:			
WOM.AM.6	Asset Management	*General Requirements*	a) FERC Uniform System of Accounts	1 – Current Functionality	UDF/DB tag	
WOM.AM.7	Asset Management	*General Requirements*	b) Continuing Property Record Code	1 – Current Functionality	UDF/DB tag	
WOM.AM.8	Asset Management	*General Requirements*	c) Imported from 3rd Party software	1 – Current Functionality	UDF/DB tag	
WOM.AM.9	Asset Management	*General Requirements*	d) User Defined	1 – Current Functionality	UDF/DB tag	
WOM.AM.10	Asset Management	*General Requirements*	Ability of system supports Geographic Information Systems (GIS) technology for locating and tracking assets.	1 – Current Functionality		
WOM.AM.11	Asset Management	*General Requirements*	Ability to attach electronic documents (including photos and video) to an asset record.	1 – Current Functionality		
WOM.AM.12	Asset Management	*General Requirements*	Ability to track at the asset level any regulatory requirements.	1 – Current Functionality		
WOM.AM.13	Asset Management	*General Requirements*	Ability of system to track sub contractors for each asset.	1 – Current Functionality		
WOM.AM.14	Asset Management	*Asset Additions and Maintenance*	Ability to track minimally the following categories of assets:	1 – Current Functionality		
WOM.AM.15	Asset Management	*Asset Additions and Maintenance*	a) Land	1 – Current Functionality		
WOM.AM.16	Asset Management	*Asset Additions and Maintenance*	b) Buildings	1 – Current Functionality		
WOM.AM.17	Asset Management	*Asset Additions and Maintenance*	c) Improvements	1 – Current Functionality		
WOM.AM.18	Asset Management	*Asset Additions and Maintenance*	d) Equipment	1 – Current Functionality		
WOM.AM.19	Asset Management	*Asset Additions and Maintenance*	e) Furniture and fixtures	1 – Current Functionality		
WOM.AM.20	Asset Management	*Asset Additions and Maintenance*	f) Vehicles	1 – Current Functionality		
WOM.AM.21	Asset Management	*Asset Additions and Maintenance*	g) Capitalized leases	1 – Current Functionality		

WOM.AM.22	**Asset Management**	***Asset Additions and Maintenance***	h) All other accounts under Ferc Uniform System	**1 – Current Functionality**		
WOM.AM.23	**Asset Management**	***Asset Additions and Maintenance***	i) Infrastructure	**1 – Current Functionality**		
WOM.AM.24	**Asset Management**	***Asset Additions and Maintenance***	j) Other user-defined categories	**1 – Current Functionality**		
WOM.AM.25	**Asset Management**	***Asset Additions and Maintenance***	k) Intangible Assets	**1 – Current Functionality**		
WOM.AM.26	**Asset Management**	***Asset Additions and Maintenance***	Ability of system to support multiple asset types including, but not limited to:	**1 – Current Functionality**		
WOM.AM.27	**Asset Management**	***Asset Additions and Maintenance***	a) Leased	**1 – Current Functionality**		
WOM.AM.28	**Asset Management**	***Asset Additions and Maintenance***	b) Non-capitalized	**1 – Current Functionality**		
WOM.AM.29	**Asset Management**	***Asset Additions and Maintenance***	c) Capital project	**1 – Current Functionality**		
WOM.AM.30	**Asset Management**	***Asset Additions and Maintenance***	d) Purchased new	**1 – Current Functionality**		
WOM.AM.31	**Asset Management**	***Asset Additions and Maintenance***	e) Purchased used	**1 – Current Functionality**		
WOM.AM.32	**Asset Management**	***Asset Additions and Maintenance***	f) Donated	**1 – Current Functionality**		
WOM.AM.33	**Asset Management**	***Asset Additions and Maintenance***	g) Lease-Purchase	**1 – Current Functionality**		
WOM.AM.34	**Asset Management**	***Asset Additions and Maintenance***	h) Grants	**1 – Current Functionality**		
WOM.AM.35	**Asset Management**	***Asset Additions and Maintenance***	i) Property & Evidence transferred to the department as assets.	**1 – Current Functionality**		
WOM.AM.36	**Asset Management**	***Asset Additions and Maintenance***	j) Seized	**1 – Current Functionality**		
WOM.AM.37	**Asset Management**	***Asset Additions and Maintenance***	k) Other as defined by users.	**1 – Current Functionality**		
WOM.AM.38	**Asset Management**	***Asset Additions and Maintenance***	l) Funding Source	**4 – Modification Required**	Enhancement required to add Funding Source.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.39	**Asset Management**	***Asset Additions and Maintenance***	System must have ability to specify the location of an asset including:			
WOM.AM.40	**Asset Management**	***Asset Additions and Maintenance***	a) Building and room number	**1 – Current Functionality**		
WOM.AM.41	**Asset Management**	***Asset Additions and Maintenance***	b) Address	**1 – Current Functionality**		
WOM.AM.42	**Asset Management**	***Asset Additions and Maintenance***	c) Parcel Number	**1 – Current Functionality**		
WOM.AM.43	**Asset Management**	***Asset Additions and Maintenance***	d) Legal description	**1 – Current Functionality**		
WOM.AM.44	**Asset Management**	***Asset Additions and Maintenance***	e) Floor Plan	**1 – Current Functionality**		
WOM.AM.45	**Asset Management**	***Asset Additions and Maintenance***	f) Underground	**1 – Current Functionality**		
WOM.AM.46	**Asset Management**	***Asset Additions and Maintenance***	g) GIS Coordinates	**1 – Current Functionality**		
WOM.AM.47	**Asset Management**	***Asset Additions and Maintenance***	h) GPS Coordinates	**1 – Current Functionality**		
WOM.AM.48	**Asset Management**	***Asset Additions and Maintenance***	i) Easement #	**1 – Current Functionality**		
WOM.AM.49	**Asset Management**	***Asset Additions and Maintenance***	j) Facility	**1 – Current Functionality**		
WOM.AM.50	**Asset Management**	***Asset Additions and Maintenance***	k) Parent/Child	**1 – Current Functionality**		
WOM.AM.51	**Asset Management**	***Asset Additions and Maintenance***	l) Department	**1 – Current Functionality**		
WOM.AM.52	**Asset Management**	***Asset Additions and Maintenance***	m) Off site repairs	**1 – Current Functionality**		
WOM.AM.53	**Asset Management**	***Asset Additions and Maintenance***	n) Facility	**1 – Current Functionality**		
WOM.AM.54	**Asset Management**	***Asset Additions and Maintenance***	System must have ability to automatically and manually assign specific or multiple item/asset number(s).	**4 – Modification Required**	An enhancement is required for this functionality.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.55	**Asset Management**	***Asset Additions and Maintenance***	Ability of system to provide a unique asset number to each item entered into system as an asset to be tracked.	**4 – Modification Required**	An enhancement is required for this functionality.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.56	**Asset Management**	***Asset Additions and Maintenance***	Ability of system to prevent use of duplicate asset numbers except for component asset numbers in which a suffix is used.	**1 – Current Functionality**		
WOM.AM.57	**Asset Management**	***Asset Additions and Maintenance***	System maintains detailed property information required to identify, properly account for, and safeguard all assets, including (but not limited to) the following:			
WOM.AM.58	**Asset Management**	***Asset Additions and Maintenance***	a) Asset Number	**1 – Current Functionality**		
WOM.AM.59	**Asset Management**	***Asset Additions and Maintenance***	b) Property tag number (inventory control number)	**1 – Current Functionality**		
WOM.AM.60	**Asset Management**	***Asset Additions and Maintenance***	c) User Defined Fields (unlimited)	**1 – Current Functionality**		
WOM.AM.61	**Asset Management**	***Asset Additions and Maintenance***	d) Chart of Account distribution	**1 – Current Functionality**		
WOM.AM.62	**Asset Management**	***Asset Additions and Maintenance***	e) Crew	**1 – Current Functionality**		
WOM.AM.63	**Asset Management**	***Asset Additions and Maintenance***	f) Department	**1 – Current Functionality**		
WOM.AM.64	**Asset Management**	***Asset Additions and Maintenance***	g) Asset acquisition date	**1 – Current Functionality**		
WOM.AM.65	**Asset Management**	***Asset Additions and Maintenance***	h) In-service date	**1 – Current Functionality**		
WOM.AM.66	**Asset Management**	***Asset Additions and Maintenance***	i) Asset condition	**1 – Current Functionality**		
WOM.AM.67	**Asset Management**	***Asset Additions and Maintenance***	j) Asset status (e.g., inactive)	**1 – Current Functionality**		
WOM.AM.68	**Asset Management**	***Asset Additions and Maintenance***	k) Unit Cost/Value	**1 – Current Functionality**		
WOM.AM.69	**Asset Management**	***Asset Additions and Maintenance***	l) Value basis	**1 – Current Functionality**		
WOM.AM.70	**Asset Management**	***Asset Additions and Maintenance***	m) Trade-in Credit	**1 – Current Functionality**		
WOM.AM.71	**Asset Management**	***Asset Additions and Maintenance***	n) Vendor Number	**1 – Current Functionality**		
WOM.AM.72	**Asset Management**	***Asset Additions and Maintenance***	o) Asset descriptive information	**1 – Current Functionality**		
WOM.AM.73	**Asset Management**	***Asset Additions and Maintenance***	p) Manufacturer Number	**1 – Current Functionality**		
WOM.AM.74	**Asset Management**	***Asset Additions and Maintenance***	q) Model Year	**1 – Current Functionality**		
WOM.AM.75	**Asset Management**	***Asset Additions and Maintenance***	r) Model number	**1 – Current Functionality**		
WOM.AM.76	**Asset Management**	***Asset Additions and Maintenance***	s) Serial number	**1 – Current Functionality**		
WOM.AM.77	**Asset Management**	***Asset Additions and Maintenance***	t) Employee name (as established in human resources module) for employee to which asset is assigned to (if applicable)	**1 – Current Functionality**		
WOM.AM.78	**Asset Management**	***Asset Additions and Maintenance***	u) Employee number (as established in human resources module) for employee to which asset is assigned to (if applicable)	**1 – Current Functionality**		
WOM.AM.79	**Asset Management**	***Asset Additions and Maintenance***	w) Warranty/Maintenance information	**1 – Current Functionality**	Warranty and maintenance information may be attached to the asset record. Additional functionality likely requires an enhancement.	
WOM.AM.80	**Asset Management**	***Asset Additions and Maintenance***	x) Maintenance Company	**1 – Current Functionality**		
WOM.AM.81	**Asset Management**	***Asset Additions and Maintenance***	y) Function Code	**1 – Current Functionality**		
WOM.AM.82	**Asset Management**	***Asset Additions and Maintenance***	z) Disposal information	**1 – Current Functionality**		
WOM.AM.83	**Asset Management**	***Asset Additions and Maintenance***	aa) Lease asset information (if applicable)	**1 – Current Functionality**	Lease information may be attached to the asset record. Additional functionality likely requires an enhancement.	
WOM.AM.84	**Asset Management**	***Asset Additions and Maintenance***	bb) Estimated Useful Life	**1 – Current Functionality**		
WOM.AM.85	**Asset Management**	***Asset Additions and Maintenance***	cc) Replacement Cost – This field can be updated as needed by users	**1 – Current Functionality**		
WOM.AM.86	**Asset Management**	***Asset Additions and Maintenance***	dd) Depreciation Schedule (Method and Life)	**1 – Current Functionality**		
WOM.AM.87	**Asset Management**	***Asset Additions and Maintenance***	ee) Depreciation Convention (Beginning of Month, Half-Year, Mid-Month, etc.)	**1 – Current Functionality**		
WOM.AM.88	**Asset Management**	***Asset Additions and Maintenance***	ff) Finance Code (I.e. purchased, grant, donation, etc.)	**1 – Current Functionality**		
WOM.AM.89	**Asset Management**	***Asset Additions and Maintenance***	gg) Meter serial number	**1 – Current Functionality**		
WOM.AM.90	**Asset Management**	***Asset Additions and Maintenance***	hh) Meter installation date	**1 – Current Functionality**		
WOM.AM.91	**Asset Management**	***Asset Additions and Maintenance***	ii) Budget Year (from which asset was purchased)	**1 – Current Functionality**		
WOM.AM.92	**Asset Management**	***Asset Additions and Maintenance***	jj) Disposal limitations (grant prohibits sale or sale proceeds go to funding agency)	**1 – Current Functionality**		
WOM.AM.93	**Asset Management**	***Asset Additions and Maintenance***	kk) Company	**1 – Current Functionality**		
WOM.AM.94	**Asset Management**	***Asset Additions and Maintenance***	ll) Vendor Name	**1 – Current Functionality**		
WOM.AM.95	**Asset Management**	***Asset Additions and Maintenance***	mm) Manufacture name	**1 – Current Functionality**		
WOM.AM.96	**Asset Management**	***Asset Additions and Maintenance***	nn) Regulatory Restrictions	**1 – Current Functionality**		
WOM.AM.97	**Asset Management**	***Asset Additions and Maintenance***	Ability of system to link component units (parent/child relationship) whereby each component maintains a financial life of its own.	**1 – Current Functionality**		
WOM.AM.98	**Asset Management**	***Asset Additions and Maintenance***	Ability of system to provide an audit trail of all changes made to asset records.	**1 – Current Functionality**		
WOM.AM.99	**Asset Management**	***Asset Additions and Maintenance***	Ability of system to provide the ability to adjust original cost/value at any time, irrespective of fiscal year boundaries.	**1 – Current Functionality**		
WOM.AM.100	**Asset Management**	***Asset Additions and Maintenance***	System need to have the ability to provide for the addition and maintenance of assets obtained through non-expenditure transactions (e.g., gifts, donations, eminent domain).	**1 – Current Functionality**		
WOM.AM.101	**Asset Management**	***Asset Additions and Maintenance***	System is able to copy an asset record to create a similar asset record.	**4 – Modification Required**	This functionality would require an enhancement.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.102	**Asset Management**	***Asset Additions and Maintenance***	Ability of Users to correct discrepancies in asset records by overriding initially loaded information (received from other integrated modules) with proper authorization.	**1 – Current Functionality**		
WOM.AM.103	**Asset Management**	***Asset Additions and Maintenance***	System provides the ability to record insurance information including:	**1 – Current Functionality**		
WOM.AM.104	**Asset Management**	***Asset Additions and Maintenance***	a) Insurance company name	**1 – Current Functionality**	Insurance information may be attached to the asset record. Additional functionality likely requires an enhancement.	
WOM.AM.105	**Asset Management**	***Asset Additions and Maintenance***	b) Insurance company address	**1 – Current Functionality**		
WOM.AM.106	**Asset Management**	***Asset Additions and Maintenance***	c) Insurable value	**1 – Current Functionality**		
WOM.AM.107	**Asset Management**	***Asset Additions and Maintenance***	d) Policy number	**1 – Current Functionality**		
WOM.AM.108	**Asset Management**	***Asset Additions and Maintenance***	e) Policy period (term)	**1 – Current Functionality**		
WOM.AM.109	**Asset Management**	***Asset Additions and Maintenance***	f) Type of coverage	**1 – Current Functionality**		
WOM.AM.110	**Asset Management**	***Asset Additions and Maintenance***	g) Liability limits	**1 – Current Functionality**		
WOM.AM.111	**Asset Management**	***Asset Additions and Maintenance***	h) Premium	**1 – Current Functionality**		
WOM.AM.112	**Asset Management**	***Asset Additions and Maintenance***	i) Other User-defined fields	**1 – Current Functionality**		
WOM.AM.113	**Asset Management**	***Asset Additions and Maintenance***	j) Previous Insurance Company	**1 – Current Functionality**		
WOM.AM.114	**Asset Management**	***Asset Additions and Maintenance***	k) Deductable	**1 – Current Functionality**		
WOM.AM.115	**Asset Management**	***Asset Additions and Maintenance***	During mass additions process, user can split asset record entries for identical items and then assign separate asset numbers (e.g., purchase of 20 identical personal computers).	**4 – Modification Required**	An enhancement is required for this functionality.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.116	**Asset Management**	***Asset Additions and Maintenance***	System provides the ability to transfer fixed assets, including partial transfers, within or between locations/organizations at the individual asset level and to generate the appropriate accounting entries for cost and accumulated deprecation, with an audit trail.	**1 – Current Functionality**	Assets can be transferred from 1 company to another as an intercompany transfer. The same accounting attributes are included as part of the transfer and can be updated if necessary.	
WOM.AM.117	**Asset Management**	***Asset Additions and Maintenance***	System provides the ability to accommodate workflow approval of the transfer of assets.	**1 – Current Functionality**		
WOM.AM.118	**Asset Management**	***Asset Additions and Maintenance***	System provides the ability to maintain information about the condition of the asset (e.g., good, idle, obsolete, broken, etc.)	**1 – Current Functionality**		
WOM.AM.119	**Asset Management**	***Asset Additions and Maintenance***	System supports multiple organization asset ownership for each property item. (Many organization units or funds may finance an asset)	**1 – Current Functionality**		
WOM.AM.120	**Asset Management**	***Asset Additions and Maintenance***	System tracks assets purchased with various funding sources (i.e. grants).	**1 – Current Functionality**		
WOM.AM.121	**Asset Management**	***Asset Disposition, Retirement, and Th***	System allows for recording of the following information related to disposals, trade-ins, missing, lost, or stolen assets:	**1 – Current Functionality**		
WOM.AM.122	**Asset Management**	***Asset Disposition, Retirement, and Th***	a) Asset number	**1 – Current Functionality**		
WOM.AM.123	**Asset Management**	***Asset Disposition, Retirement, and Th***	b) Reporting individual	**1 – Current Functionality**		
WOM.AM.124	**Asset Management**	***Asset Disposition, Retirement, and Th***	c) Date of occurrence or date first noticed missing	**1 – Current Functionality**		
WOM.AM.125	**Asset Management**	***Asset Disposition, Retirement, and Th***	d) Description of circumstances surrounding the disappearance/disposition	**1 – Current Functionality**		
WOM.AM.126	**Asset Management**	***Asset Disposition, Retirement, and Th***	e) Steps taken to locate item	**1 – Current Functionality**		
WOM.AM.127	**Asset Management**	***Asset Disposition, Retirement, and Th***	f) Disposal date	**1 – Current Functionality**		
WOM.AM.128	**Asset Management**	***Asset Disposition, Retirement, and Th***	g) Disposal amount	**1 – Current Functionality**		
WOM.AM.129	**Asset Management**	***Asset Disposition, Retirement, and Th***	h) Disposal method	**1 – Current Functionality**		
WOM.AM.130	**Asset Management**	***Asset Disposition, Retirement, and Th***	i) Disposal type	**1 – Current Functionality**		

WOM.AM.131	**Asset Management**	***Asset Disposition, Retirement, and Th***	j) Proceeds, if any	**1 – Current Functionality**		
WOM.AM.132	**Asset Management**	***Asset Disposition, Retirement, and Th***	k) Like-Kind exchange	**1 – Current Functionality**		
WOM.AM.133	**Asset Management**	***Asset Disposition, Retirement, and Th***	l) Police Report	**4 – Modification Required**	Police report can be added as an attached to the asset.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.134	**Asset Management**	***Asset Disposition, Retirement, and Th***	m) Vendor Information	**1 – Current Functionality**		
WOM.AM.135	**Asset Management**	***Asset Disposition, Retirement, and Th***	n) Description	**1 – Current Functionality**		
WOM.AM.136	**Asset Management**	***Asset Disposition, Retirement, and Th***	o) Serial #	**1 – Current Functionality**	Asset ID in Workday	
WOM.AM.137	**Asset Management**	***Asset Disposition, Retirement, and Th***	p) Invoice #	**1 – Current Functionality**		
WOM.AM.138	**Asset Management**	***Asset Disposition, Retirement, and Th***	System provides the ability to track replacement needs for assets. Tracks estimated useful life and provides electronic notification to users when useful life threshold is nearing.	**1 – Current Functionality**	Asset Buisness Process Steps can be configured to notify users of asset's status, seen on the Asset Dashboard in Workday or Workday reports.	
WOM.AM.139	**Asset Management**	***Asset Disposition, Retirement, and Th***	Ability to allow the application of indices and/or factors to historical costs to asset(s) to update the replacement cost data.	**1 – Current Functionality**	You can adjust the useful life of an asset directly in Workday. If there is a need to adjust automatically based on variables, require a a solution leveraging Workday Extend to make the automated adjustment.	
WOM.AM.140	**Asset Management**	***Asset Disposition, Retirement, and Th***	Ability to attach grant expiration date to asset and notify users when expiration date is imminent.	**1 – Current Functionality**		
WOM.AM.141	**Asset Management**	***Asset Disposition, Retirement, and Th***	System provides the ability to flag assets with disposal restrictions and display the restriction message for user handling (e.g., federal grant items that must be returned to the federal government)	**1 – Current Functionality**		
WOM.AM.142	**Asset Management**	***Asset Disposition, Retirement, and Th***	System provides the ability to accommodate workflow approval of the disposal of assets.	**1 – Current Functionality**		
WOM.AM.143	**Asset Management**	***Depreciation***	System can generate a financial transactions to the General Ledger module for capital asset depreciation expense in specified funds.	**1 – Current Functionality**		
WOM.AM.144	**Asset Management**	***Depreciation***	Ability to provide depreciation schedules on fixed assets.	**1 – Current Functionality**		
WOM.AM.145	**Asset Management**	***Depreciation***	Ability to automatically calculate depreciation in accordance with the depreciation method and convention where designated for an asset.	**1 – Current Functionality**		
WOM.AM.146	**Asset Management**	***Depreciation***	Ability to maintain multiple asset basis values for each asset if desired, utilizing industry-standard depreciation methods.	**1 – Current Functionality**		
WOM.AM.147	**Asset Management**	***Depreciation***	Ability to automatically charge depreciation to multiple chart of accounts for split-ownership assets.	**1 – Current Functionality**	Can split asset cost and depreciation across multiple cost centers or other chart of accounts	
WOM.AM.148	**Asset Management**	***Depreciation***	System supports user-defined time periods for recording depreciation.	**1 – Current Functionality**	Can define custom depreciation percentages for each period that assets depreciate	
WOM.AM.149	**Asset Management**	***Depreciation***	System allows for multiple depreciation schedules to be applied to an asset to support separate depreciation reporting requirements.	**1 – Current Functionality**		
WOM.AM.150	**Asset Management**	***Depreciation***	System allows for changing asset useful life, value basis, salvage value, and depreciation method when necessary, and automatically recalculating depreciation expense in accordance with such changes (with proper authorization).	**1 – Current Functionality**		
WOM.AM.151	**Asset Management**	***Depreciation***	System provides the ability to simulate depreciation calculations for individual assets or group of assets without being required to post the results.	**1 – Current Functionality**		
WOM.AM.152	**Asset Management**	***Depreciation***	Provides allocation tables which can be user-defined to allocate asset cost, accumulated depreciation and depreciation expense for multiple owner assets.	**1 – Current Functionality**		
WOM.AM.153	**Asset Management**	***Depreciation***	System provides the ability to store an acquisition date and a depreciation-start date (in-service date), and the dates do not have to be the same date.	**1 – Current Functionality**		
WOM.AM.154	**Asset Management**	***Depreciation***	System provides multiple depreciation methods including, but not limited to:	**1 – Current Functionality**		
WOM.AM.155	**Asset Management**	***Depreciation***	a) Straight Line	**1 – Current Functionality**		
WOM.AM.156	**Asset Management**	***Depreciation***	b) Declining Balance	**1 – Current Functionality**		
WOM.AM.157	**Asset Management**	***Depreciation***	c) Sum of the Years Digits	**1 – Current Functionality**		
WOM.AM.158	**Asset Management**	***Depreciation***	d) User Defined	**1 – Current Functionality**		
WOM.AM.159	**Asset Management**	***Depreciation***	System prevents the depreciating of an asset's value below zero.	**1 – Current Functionality**		
WOM.AM.160	**Asset Management**	***Depreciation***	System must have ability to record different conventions for depreciable assets such as beginning of month, half year, mid-month, etc.	**1 – Current Functionality**		
WOM.AM.161	**Asset Management**	***Depreciation***	System allows depreciation methods to be changed for an asset or group of assets, to depreciate the assets for the balance of the asset's useful life.	**1 – Current Functionality**		
WOM.AM.162	**Asset Management**	***Depreciation***	System allows some assets to be designated as non-depreciable (i.e., land).	**1 – Current Functionality**		
WOM.AM.163	**Asset Management**	***Depreciation***	Ability of system to use different depreciation by asset.	**1 – Current Functionality**		
WOM.AM.164	**Asset Management**	***Capital Projects***	System is able to identify/record all capitalized costs associated with the construction or purchase/acquisition of an asset.	**1 – Current Functionality**		
WOM.AM.165	**Asset Management**	***Capital Projects***	System identifies, records, and depreciates additions associated with an asset, including optional unique identification of additions associated with component units.	**1 – Current Functionality**		
WOM.AM.166	**Asset Management**	***Capital Projects***	System is able to capture activity costs resulting from several departments working concurrently on a project.	**1 – Current Functionality**		
WOM.AM.167	**Asset Management**	***Capital Projects***	System is able to produce notification of project status (e.g., completed) based upon user-defined criteria.	**1 – Current Functionality**		
WOM.AM.168	**Asset Management**	***Capital Projects***	System captures and maintains construction work in progress information (i.e., architectural barrier removal projects being conducted in accordance with ADA transition plans) and provides the ability to recognize fixed/capital assets when they are completed, regardless of whether the project has been completed.	**1 – Current Functionality**		
WOM.AM.169	**Asset Management**	***Asset Warranties and Service***	System is able to maintain online maintenance history and warranty/service agreement information for assets.	**1 – Current Functionality**		
WOM.AM.170	**Asset Management**	***Asset Warranties and Service***	Authorized staff should be able to inquire on maintenance and service information through the entry of a property tag / inventory control number.	**1 – Current Functionality**		
WOM.AM.171	**Asset Management**	***Asset Warranties and Service***	System is able to record and track regular/preventive maintenance performed on selected assets.	**1 – Current Functionality**		
WOM.AM.172	**Asset Management**	***Buildings***	System maintains user-defined information on buildings pertinent to insurance underwriting, including (but not limited to):	**1 – Current Functionality**		
WOM.AM.173	**Asset Management**	***Buildings***	a) Location	**1 – Current Functionality**	Building insurance underwriting information may be attached to the asset record. Additional functionality likely requires an enhancement.	
WOM.AM.174	**Asset Management**	***Buildings***	b) Building age / date constructed	**1 – Current Functionality**		
WOM.AM.175	**Asset Management**	***Buildings***	c) Number of stories	**1 – Current Functionality**		
WOM.AM.176	**Asset Management**	***Buildings***	d) Construction type	**1 – Current Functionality**		
WOM.AM.177	**Asset Management**	***Buildings***	e) Foundation	**1 – Current Functionality**		
WOM.AM.178	**Asset Management**	***Buildings***	f) Air handling system	**1 – Current Functionality**		
WOM.AM.179	**Asset Management**	***Buildings***	g) Square footage	**1 – Current Functionality**		
WOM.AM.180	**Asset Management**	***Buildings***	h) Roof type	**1 – Current Functionality**		
WOM.AM.181	**Asset Management**	***Buildings***	i) Condition	**1 – Current Functionality**		
WOM.AM.182	**Asset Management**	***Buildings***	j) Maintenance requirements / actual maintenance performed	**1 – Current Functionality**		
WOM.AM.183	**Asset Management**	***Buildings***	k) Inspection requirements / actual inspections performed	**1 – Current Functionality**		
WOM.AM.184	**Asset Management**	***Buildings***	l) Fire protection systems	**1 – Current Functionality**		
WOM.AM.185	**Asset Management**	***Buildings***	m) Building fuel information	**1 – Current Functionality**		
WOM.AM.186	**Asset Management**	***Buildings***	n) Usage	**1 – Current Functionality**		
WOM.AM.187	**Asset Management**	***Buildings***	o) Valuation	**1 – Current Functionality**		
WOM.AM.188	**Asset Management**	***Buildings***	p) Valuation date	**1 – Current Functionality**		
WOM.AM.189	**Asset Management**	***Buildings***	q) Valuation method	**1 – Current Functionality**		
WOM.AM.190	**Asset Management**	***Buildings***	r) Insurance information (company, policy, coverage amount, etc.)	**1 – Current Functionality**	Building insurance underwriting information may be attached to the asset record. Additional functionality likely requires an enhancement.	
WOM.AM.191	**Asset Management**	***Buildings***	s) Geographic Information System technology location	**1 – Current Functionality**		
WOM.AM.192	**Asset Management**	***Buildings***	t) Loss history	**1 – Current Functionality**		
WOM.AM.193	**Asset Management**	***Buildings***	u) Date of occupancy	**1 – Current Functionality**		
WOM.AM.194	**Asset Management**	***Buildings***	v) Occupants (multiple)	**1 – Current Functionality**		
WOM.AM.195	**Asset Management**	***Buildings***	w) Square footage for each occupant (e.g., by department)	**4 – Modification Required**	This functionality requires an enhancement.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.AM.196	**Asset Management**	***Buildings***	x) PIN (assessor's parcel number)	**1 – Current Functionality**		
WOM.AM.197	**Asset Management**	***Buildings***	z) Building accessibility features	**1 – Current Functionality**		
WOM.AM.198	**Asset Management**	***Buildings***	z) Building accessibility features	**1 – Current Functionality**		
WOM.AM.199	**Asset Management**	***Buildings***	aa) Other User-defined fields	**1 – Current Functionality**		
WOM.AM.200	**Asset Management**	***Buildings***	bb) Facility	**1 – Current Functionality**		
WOM.AM.201	**Asset Management**	***Buildings***	cc) Hazardous Material Status	**1 – Current Functionality**		
WOM.AM.202	**Asset Management**	***Buildings***	dd) Separate Access Control	**1 – Current Functionality**		
WOM.AM.203	**Asset Management**	***Buildings***	ee) Hazardous Building Materials	**1 – Current Functionality**		
WOM.AM.204	**Asset Management**	***Buildings***	ff) Infrastructure	**1 – Current Functionality**		
WOM.AM.205	**Asset Management**	***Buildings***	System is able to link component units in a parent/child relationship whereby each component (i.e., land, betterments, etc.) maintains a financial life of its own.			
WOM.AM.206	**Asset Management**	***Querying and Reporting***	System is able to perform ad hoc querying and reporting on assets at user-defined fields.	**1 – Current Functionality**		
WOM.AM.207	**Asset Management**	***Querying and Reporting***	System is able to generate standard governmental fixed asset reports and user defined fixed asset reports, including but not limited to the Statement of Fixed Asset reports in standard CAFR format.			
WOM.AM.208	**Asset Management**	***Querying and Reporting***	System allows online inquiry for each asset of a group of assets.	**1 – Current Functionality**		
WOM.AM.209	**Asset Management**	***Querying and Reporting***	System can provide a dollar total of fixed asset purchases by their funding source and department/organization.	**1 – Current Functionality**		
WOM.AM.210	**Asset Management**	***Querying and Reporting***	System reports assets due for disposition, based on the scheduled disposal date and type.	**1 – Current Functionality**		
WOM.AM.211	**Asset Management**	***Querying and Reporting***	System is able to provide a vendor/PO listing of assets by vendor or in purchase order number sequence.			
WOM.AM.212	**Asset Management**	***Querying and Reporting***	System is able to produce a disposition report showing items by asset type which have physically been disposed of but still remain on file for information purposes.	**1 – Current Functionality**		
WOM.AM.213	**Asset Management**	***Querying and Reporting***	System is able to produce a listing of all depreciated/disposed assets showing any gains or losses and the associated account coding, by type.			
WOM.AM.214	**Asset Management**	***Querying and Reporting***	System allows the reporting and inquiry of replacement cost by department or organization unit and by asset type.			
WOM.AM.215	**Asset Management**	***Querying and Reporting***	System is able to produce a forecast of assets scheduled for replacement, based on user-specified criteria, such as useful life, scheduled disposition date, or odometer readings.			
WOM.AM.216	**Asset Management**	***Querying and Reporting***	System is able to produce a depreciation report by balance sheet category, such as buildings and equipment.	**1 – Current Functionality**		
WOM.AM.217	**Asset Management**	***Querying and Reporting***	System is able to produce a report of assets by:			

WOM.AM.218	**Asset Management**	***Querying and Reporting***	a) Fund			
WOM.AM.219	**Asset Management**	***Querying and Reporting***	b) Department	**1 – Current Functionality**		
WOM.AM.220	**Asset Management**	***Querying and Reporting***	c) Company	**1 – Current Functionality**		
WOM.AM.221	**Asset Management**	***Querying and Reporting***	d) Function (i.e., Public Protection, Health & Sanitation, etc.)	**1 – Current Functionality**		
WOM.AM.222	**Asset Management**	***Querying and Reporting***	e) Budget Unit	**1 – Current Functionality**		
WOM.AM.223	**Asset Management**	***Querying and Reporting***	f) Account code	**1 – Current Functionality**	Workflow validation and rules can be set by any field in the Workday application, so as long as this field you resides in the application you can have workflow steps flow through these users, role, department, etc.	
WOM.AM.224	**Asset Management**	***Querying and Reporting***	g) Activity	**1 – Current Functionality**		
WOM.AM.225	**Asset Management**	***Querying and Reporting***	h) Age of the assets, based on acquisition date			
WOM.AM.226	**Asset Management**	***Querying and Reporting***	i) Vendor	**1 – Current Functionality**		
WOM.AM.227	**Asset Management**	***Querying and Reporting***	j) Manufacturer	**1 – Current Functionality**		
WOM.AM.228	**Asset Management**	***Querying and Reporting***	k) Subcontractor	**1 – Current Functionality**		
WOM.AM.229	**Asset Management**	***Querying and Reporting***	l) FERC			
WOM.AM.230	**Asset Management**	***Querying and Reporting***	m) Location	**1 – Current Functionality**		
WOM.AM.231	**Asset Management**	***Querying and Reporting***	System provides the ability to produce a physical inventory worksheet to be sorted by department, location, type, and/or person responsible to assist in conducting physical inventory.			
WOM.AM.232	**Asset Management**	***Querying and Reporting***	System is able to produce a report that facilitates reconciliation to physical inventory counts.			
WOM.AM.233	**Asset Management**	***Querying and Reporting***	System provides the ability to print reports at various remote locations.	**1 – Current Functionality**		
WOM.AM.234	**Asset Management**	***Querying and Reporting***	System is able to provide a schedule of assets grouped by GAAFR function and/or departments.			
WOM.AM.235	**Asset Management**	***Querying and Reporting***	System is able to generate a report for assets purchased with grant funding	**1 – Current Functionality**		
WOM.AM.236	**Asset Management**	***Querying and Reporting***	System provides a report that forecasts depreciation by individual asset, groups of assets, or total assets for a user-specified period of time.	**1 – Current Functionality**		
WOM.AM.237	**Asset Management**	***Querying and Reporting***	System is able to identify and sort items ordered and received by Department			
WOM.AM.238	**Asset Management**	***Querying and Reporting***	System provides the ability to generate a report for all items assigned to a specific location by portable equipment and fixed assets			
WOM.AM.239	**Asset Management**	***Querying and Reporting***	System provides the ability to interface with other desktop applications (i.e. MS Word, MS Access, MS Excel, Report Writer) without bypassing security.			
WOM.AM.240	**Asset Management**	***Querying and Reporting***	System has the ability to produce property tags.			
WOM.PM.1	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to maintain an inventory of information on all assets, such as main lines, service lines, meters, pumps, valves, other devices, and buildings	**1 – Current Functionality**		
WOM.PM.2	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to maintain a history of all activities, including labor, contract labor, parts, in-house equipment costs and rental equipment costs that have been performed on a particular asset, contract number, or vendor (Both PM and repair costs)	**1 – Current Functionality**		
WOM.PM.3	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to allow for PM schedules to be established by a combination of time, usage, consumption, frequency, asset age, and location	**1 – Current Functionality**		
WOM.PM.4	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to user define codes and categories of PM schedule types	**1 – Current Functionality**		
WOM.PM.5	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to allow for the user to select the code or category from a drop-down list when linking the schedule to a task code	**1 – Current Functionality**		
WOM.PM.6	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to update or delete an existing PM schedule	**1 – Current Functionality**		
WOM.PM.7	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to suspend an existing PM schedule for future rescheduling (task on demand)	**1 – Current Functionality**		
WOM.PM.8	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to identify, track, and maintain active (closed or open) work order records related to the asset	**1 – Current Functionality**		
WOM.PM.9	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to allow both scheduled and unscheduled work orders to be modified, without modifying the original assigned activity template	**1 – Current Functionality**		
WOM.PM.10	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to establish and maintain a record of all parts used in maintenance and overhaul activities by asset	**1 – Current Functionality**		
WOM.PM.11	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to record and display all parts issues, receipts, transfers, and audits for each asset	**1 – Current Functionality**		
WOM.PM.12	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to maintain a record for each vendor that is used for supplying parts for the maintenance equipment			
WOM.PM.13	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to provide a cross-reference between the vendor's part number and the manufacturer's part number			
WOM.PM.14	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate a report that gives the following information: all alarms, equipment set-points, and settings, and/or any changes to the settings	**1 – Current Functionality**		
WOM.PM.15	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to set scheduling of preventive maintenance activities by a fixed method (e.g., every month regardless of when the last preventive maintenance was complete)	**1 – Current Functionality**	SpryMobile - Work Orders & Asset Management	
WOM.PM.16	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to schedule PM activities by a floating method (e.g., 30 days from the previous PM close date)	**1 – Current Functionality**		
WOM.PM.17	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to set up and schedule seasonal preventive maintenance activities	**1 – Current Functionality**		
WOM.PM.18	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to flag and comment on a work order for work completed with potential outstanding issues to be addressed	**1 – Current Functionality**		
WOM.PM.19	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to automatically route the above to the appropriate work queue for analysis and follow-up	**1 – Current Functionality**		
WOM.PM.20	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to allow scheduling of preventive maintenance activities by a yearly, monthly, weekly, daily, hourly or on any combination basis	**1 – Current Functionality**		
WOM.PM.21	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability for a worked PM to cancel a previous unworked PM for the same activity with a reason code defining why it was cancelled	**1 – Current Functionality**		
WOM.PM.22	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to attach/link scanned or design drawings and reference documents to a PM record	**1 – Current Functionality**		
WOM.PM.23	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to allow an unlimited amount of tasks assigned to a PM activity	**1 – Current Functionality**		
WOM.PM.24	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to add unlimited comments to the PM activity	**1 – Current Functionality**		
WOM.PM.25	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to make global changes to preventive maintenance schedules and work orders	**1 – Current Functionality**		
WOM.PM.26	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to link multiple asset components to similar PM schedules	**1 – Current Functionality**		
WOM.PM.27	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to forecast future PM requirements	**4 – Modification Required**	Custom Report Development would be required.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.PM.28	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to allow new corrective/repair work orders/requests to be created during preventive maintenance without re-entering data	**1 – Current Functionality**		
WOM.PM.29	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to capture audit trail information on all transactions (e.g., user, date, and time stamp)	**1 – Current Functionality**		
WOM.PM.30	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to define subsets of any facility's assets	**1 – Current Functionality**		
WOM.PM.31	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to attach electronic documents (including photos and video) to an asset record	**1 – Current Functionality**		
WOM.PM.32	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to establish preventive, predictive and condition-based maintenance programs to extend asset life and improve reliability	**1 – Current Functionality**		
WOM.PM.33	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to setup multiple maintenance schedules for each asset so that maintenance types can be tracked for each asset and work orders will automatically be generated	**1 – Current Functionality**		
WOM.PM.34	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to drill down to maintenance records from the facilities asset record so that maintenance history can be viewed	**1 – Current Functionality**		
WOM.PM.35	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate a new W/O (child) for work not completed	**1 – Current Functionality**		
WOM.PM.36	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate a PM W/O for asset based on regulatory requirements	**1 – Current Functionality**		
WOM.PM.37	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to cross-reference PM work orders to the NERC policies and procedures?	**1 – Current Functionality**		
WOM.PM.38	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to capture the test results for the PM work orders	**1 – Current Functionality**		
WOM.PM.39	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate evidence reports by date and time stamp	**1 – Current Functionality**		
WOM.PM.40	**Preventative Maintenance**	***Preventative Maintenance***	Does your product generate the required quarterly NERC exceptions reports	**4 – Modification Required**	An enhancement is required for this functionality.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.PM.41	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to establish preventive, predictive and condition-based maintenance programs to extend asset life and improve reliability	**1 – Current Functionality**		
WOM.PM.42	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to setup multiple maintenance schedules for each asset so that maintenance types can be tracked for each asset and work orders will automatically be generated	**1 – Current Functionality**		
WOM.PM.43	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to schedule maintenance annually, semi-annually, quarterly, monthly, by specific date	**1 – Current Functionality**		
WOM.PM.44	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to schedule maintenance by asset hours, asset mileage, and other specified events	**1 – Current Functionality**		
WOM.PM.45	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to capture audit trail information on all transactions (e.g., user, date, and time stamp)	**1 – Current Functionality**		
WOM.PM.46	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to automatically schedule maintenance based upon predefined rules for each asset type and automatically generate work order	**1 – Current Functionality**		
WOM.PM.47	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to group maintenance types so that they are scheduled on same date preventing multiple work orders from generating and limiting down time	**1 – Current Functionality**		
WOM.PM.48	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to drill down to maintenance records from the asset record so that maintenance history can be viewed	**1 – Current Functionality**		
WOM.PM.49	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to attach electronic documents (including photos) to the asset to track preventative maintenance	**1 – Current Functionality**		
WOM.PM.50	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to tie inventory requirements to the work order based on a combination of PM tasks, equipment model, and equipment year	**1 – Current Functionality**		
WOM.PM.51	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to defer work order until required inventory is available	**1 – Current Functionality**		
WOM.PM.52	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate an inventory "pick list" of the required inventory			
WOM.PM.53	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate a purchase requisition for a kit of components needed for a scheduled maintenance activity			
WOM.PM.54	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to add a comment to maintenance record	**1 – Current Functionality**		
WOM.PM.55	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to record condition of equipment at time of maintenance	**1 – Current Functionality**		
WOM.PM.56	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to enter asset hours and/or mileage at time of maintenance with ability to enter the following:			
WOM.PM.57	**Preventative Maintenance**	***Preventative Maintenance***	a) Overrides	**1 – Current Functionality**		
WOM.PM.58	**Preventative Maintenance**	***Preventative Maintenance***	b) Asset number	**1 – Current Functionality**		
WOM.PM.59	**Preventative Maintenance**	***Preventative Maintenance***	c) Asset type	**1 – Current Functionality**		

WOM.PM.60	**Preventative Maintenance**	***Preventative Maintenance***	d) Asset model	**1 – Current Functionality**		
WOM.PM.61	**Preventative Maintenance**	***Preventative Maintenance***	e) Asset year	**1 – Current Functionality**		
WOM.PM.62	**Preventative Maintenance**	***Preventative Maintenance***	f) Asset assignment	**1 – Current Functionality**		
WOM.PM.63	**Preventative Maintenance**	***Preventative Maintenance***	g) Asset maintenance vendor	**1 – Current Functionality**		
WOM.PM.64	**Preventative Maintenance**	***Preventative Maintenance***	h) Asset hours	**1 – Current Functionality**		
WOM.PM.65	**Preventative Maintenance**	***Preventative Maintenance***	i) Asset mileage	**1 – Current Functionality**		
WOM.PM.66	**Preventative Maintenance**	***Preventative Maintenance***	j) Asset scheduled service date	**1 – Current Functionality**		
WOM.PM.67	**Preventative Maintenance**	***Preventative Maintenance***	k) Asset actual service date	**1 – Current Functionality**		
WOM.PM.68	**Preventative Maintenance**	***Preventative Maintenance***	l) Asset maintenance type	**1 – Current Functionality**		
WOM.PM.69	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to track due dates, grace periods, drop dead dates, early performance dates, delayed performance, seasonal tasks, and deferrals	**1 – Current Functionality**		
WOM.PM.70	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to automatically adjust user-defined PM type schedules based on other PM activities (e.g., if due at 500 hour intervals but actually completed after 600 hours, automatically adjust the next scheduled PM to 1100 hours)	**1 – Current Functionality**		
WOM.PM.71	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to manually adjust PM schedules based on actual PM activities (e.g., if due at 500 hour intervals but actually completed after 600, manually specify the next PM is at 1100 hours)	**1 – Current Functionality**		
WOM.PM.72	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate automatic email notification with multiple notification levels of upcoming maintenance due	**1 – Current Functionality**		
WOM.PM.73	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to create system alert of upcoming or past due maintenance	**1 – Current Functionality**		
WOM.PM.74	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to track inspection and calibration readings associated with PM tasks	**1 – Current Functionality**		
WOM.PM.75	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to manually create emergency work orders based on unscheduled conditions or events (e.g., engine noise)	**1 – Current Functionality**		
WOM.PM.76	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to automatically generate unscheduled repair work orders based on the results from an emergency order	**1 – Current Functionality**		
WOM.PM.77	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to match future (short term) PM requirements with an emergency order and create all work that should be performed while equipment is in for repair	**1 – Current Functionality**		
WOM.PM.78	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to capture and view all unscheduled maintenance details the same as PM details	**1 – Current Functionality**		
WOM.PM.79	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to tie inventory requirements to the work order based on a combination of repair task(s), equipment model, and equipment year	**4 – Modification Required**	An enhancement is required for the is functionality.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.PM.80	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to generate a purchase requisition for a kit of components needed for an unscheduled repair	**4 – Modification Required**		**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.PM.81	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to capitalize certain unscheduled work that increases the value and/or life of the equipment			
WOM.PM.82	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to schedule and track history of asset safety and regulatory testing so that so that multiple compliance types can be tracked for each asset	**1 – Current Functionality**		
WOM.PM.83	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to create user defined test types with system validation	**1 – Current Functionality**		
WOM.PM.84	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to schedule regulatory/vendor testing annually, semi-annually, monthly, and on a specific date	**1 – Current Functionality**		
WOM.PM.85	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to schedule regulatory/vendor testing by asset hours, asset mileage, and other specified events	**1 – Current Functionality**		
WOM.PM.86	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to provide audit trail and history of all changes to compliance testing including changed by and date changed	**1 – Current Functionality**		
WOM.PM.87	**Preventative Maintenance**	***Preventative Maintenance***	Automatically establish testing schedule based upon asset type and automatically generate work order	**1 – Current Functionality**		
WOM.PM.88	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to drill down to regulatory/vendor testing record from the asset record so that maintenance history can be:			
WOM.PM.89	**Preventative Maintenance**	***Preventative Maintenance***	a) Viewed	**1 – Current Functionality**		
WOM.PM.90	**Preventative Maintenance**	***Preventative Maintenance***	b) Test type	**1 – Current Functionality**		
WOM.PM.91	**Preventative Maintenance**	***Preventative Maintenance***	c) Test date - scheduled	**1 – Current Functionality**		
WOM.PM.92	**Preventative Maintenance**	***Preventative Maintenance***	d) Test date - actual	**1 – Current Functionality**		
WOM.PM.93	**Preventative Maintenance**	***Preventative Maintenance***	e) Asset hours at time of safety testing	**1 – Current Functionality**		
WOM.PM.94	**Preventative Maintenance**	***Preventative Maintenance***	f) Asset mileage at time of safety testing	**1 – Current Functionality**		
WOM.PM.95	**Preventative Maintenance**	***Preventative Maintenance***	g) Ability to select a pass/fail status on each record	**1 – Current Functionality**		
WOM.PM.96	**Preventative Maintenance**	***Preventative Maintenance***	h) Ability to select reason for failure	**1 – Current Functionality**		
WOM.PM.97	**Preventative Maintenance**	***Preventative Maintenance***	i) Certification #	**1 – Current Functionality**		
WOM.PM.98	**Preventative Maintenance**	***Preventative Maintenance***	System has the ability to attach electronic documents (including photos) to the asset to track regulatory compliance	**1 – Current Functionality**		
WOM.MWM.1	**Mobile Work Management**	***Mobile Work Management***	System has the ability to utilize a variety of devices for remote connectivity including handhelds & ruggedized laptops	**1 – Current Functionality**	All SpryPoint applications are built using a responsive design and are device agnostic. Mobile Field Service includes native applications available in iOS and Android.	
WOM.MWM.2	**Mobile Work Management**	***Mobile Work Management***	System has the ability to encrypt data so that data traveling over a wireless network is secure	**1 – Current Functionality**		
WOM.MWM.3	**Mobile Work Management**	***Mobile Work Management***	System has the ability to support work request and work order transactions including creation, update, status change, and search capabilities of work orders through a mobile device in both real time and batch upload	**1 – Current Functionality**		
WOM.MWM.4	**Mobile Work Management**	***Mobile Work Management***	System has the ability to view real time inventory item catalog, quantity on hand, status of materials on order, and purchase history through mobile device	**4 – Modification Required**	This functionality requires an enhancement.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.MWM.5	**Mobile Work Management**	***Mobile Work Management***	System has the ability for mobile devices to receive information from CIS and EAM applications and send information to both systems	**1 – Current Functionality**		
WOM.MWM.6	**Mobile Work Management**	***Mobile Work Management***	System has the ability to prohibit certain fields from being displayed on any mobile device (e.g., SSN, Hourly Rates, etc.)	**1 – Current Functionality**		
WOM.MWM.7	**Mobile Work Management**	***Mobile Work Management***	System has the ability to view and update all items in a work queue through mobile device	**1 – Current Functionality**		
WOM.MWM.8	**Mobile Work Management**	***Mobile Work Management***	System has the ability to view crew assignments and receive updates through mobile device	**1 – Current Functionality**		
WOM.MWM.9	**Mobile Work Management**	***Mobile Work Management***	System has the ability to enter labor hours and equipment hours incurred on a work order through mobile device	**1 – Current Functionality**		
WOM.MWM.10	**Mobile Work Management**	***Mobile Work Management***	System has the ability to capture equipment hours on the job and hours actually being used	**1 – Current Functionality**		
WOM.MWM.11	**Mobile Work Management**	***Mobile Work Management***	System has the ability for supervisors to update crew assignments through a mobile device	**1 – Current Functionality**		
WOM.MWM.12	**Mobile Work Management**	***Mobile Work Management***	System has the ability to view and receive work order status updates through mobile device	**1 – Current Functionality**		
WOM.MWM.13	**Mobile Work Management**	***Mobile Work Management***	System has the ability to view and create transactions relating to work order events, permit tracking, easement tracking, equipment rental, contractors, and work order contact information through mobile device	**1 – Current Functionality**		
WOM.MWM.14	**Mobile Work Management**	***Mobile Work Management***	System has the ability to accept credit card information and pass to CIS through mobile device	**4 – Modification Required**	An enhancement is required for this functionality.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.JC.1	**Job Costing**	***Job Costing***	System has the ability to track projects by user-defined criteria (e.g., department, project type, etc.)?	**1 – Current Functionality**		
WOM.JC.2	**Job Costing**	***Job Costing***	System has the ability to support multiple-year projects	**1 – Current Functionality**		
WOM.JC.3	**Job Costing**	***Job Costing***	System has the ability to support sub-projects within a larger project	**1 – Current Functionality**		
WOM.JC.4	**Job Costing**	***Job Costing***	System has the ability to track multiple projects within a work order	**1 – Current Functionality**		
WOM.JC.5	**Job Costing**	***Job Costing***	System has the ability to manage several sub-projects under one master project	**1 – Current Functionality**		
WOM.JC.6	**Job Costing**	***Job Costing***	System has the ability to attach unlimited supporting documents throughout the life of the project	**1 – Current Functionality**	Cannot attach CAD documents. These are particular format required that workday cannot support.	
WOM.JC.7	**Job Costing**	***Job Costing***	System has the ability to allow projects to be established across multiple departments	**1 – Current Functionality**		
WOM.JC.8	**Job Costing**	***Job Costing***	System has the ability to allocate direct and indirect financing costs to projects	**1 – Current Functionality**		
WOM.JC.9	**Job Costing**	***Job Costing***	System has the ability to link a project to other projects at the same location	**1 – Current Functionality**		
WOM.JC.10	**Job Costing**	***Job Costing***	System has the ability to not exceed the budget without a security controlled override	**1 – Current Functionality**		
WOM.JC.11	**Job Costing**	***Job Costing***	System has the ability to calculate and apply overhead to work in progress projects	**1 – Current Functionality**		
WOM.JC.12	**Job Costing**	***Job Costing***	System has the ability to automatically calculate asset depreciation once a project is closed	**1 – Current Functionality**		
WOM.JC.13	**Job Costing**	***Job Costing***	System has the ability to set up projects by type (e.g., capital or maintenance)	**1 – Current Functionality**		
WOM.JC.14	**Job Costing**	***Job Costing***	System has the ability to use project templates to set up new projects with required data	**1 – Current Functionality**		
WOM.JC.15	**Job Costing**	***Job Costing***	System has the ability throughout the organization to access project information with role-based security	**1 – Current Functionality**		
WOM.JC.16	**Job Costing**	***Job Costing***	System has the ability to allow and/or prevent users from updating certain project information and costs after it has been submitted and approved	**1 – Current Functionality**		
WOM.JC.17	**Job Costing**	***Job Costing***	System has the ability to enter project requests into the system, route for approval and return to requestor with status (e.g., work orders, capital, maintenance)	**1 – Current Functionality**		
WOM.JC.18	**Job Costing**	***Job Costing***	System has the ability to carry forward or not carry forward fiscal year funding for multi-year projects	**1 – Current Functionality**		
WOM.JC.19	**Job Costing**	***Job Costing***	System has the ability to prevent deletion of a project that has begun but has not been closed	**1 – Current Functionality**		
WOM.JC.20	**Job Costing**	***Job Costing***	System has the ability to allow the user to control the project closing process through security	**1 – Current Functionality**		
WOM.JC.21	**Job Costing**	***Job Costing***	System has the ability to allow for multiple user defined closure dates	**1 – Current Functionality**		
WOM.JC.22	**Job Costing**	***Job Costing***	System has the ability to close projects partially or completely	**1 – Current Functionality**		
WOM.JC.23	**Job Costing**	***Job Costing***	System has the ability to close and capitalize or expense each project as completed	**1 – Current Functionality**		
WOM.JC.24	**Job Costing**	***Job Costing***	System has the ability to automatically make the required entries to the asset or expense accounts, and to work-in-progress and/or construction in progress accounts	**1 – Current Functionality**		
WOM.JC.25	**Job Costing**	***Job Costing***	System has the ability to transfer construction-in-progress accounts to the appropriate fixed asset accounts at project close or completion	**1 – Current Functionality**		
WOM.JC.26	**Job Costing**	***Job Costing***	System has the ability to change project type (e.g., from capital project to an expensed project)	**1 – Current Functionality**		
WOM.JC.27	**Job Costing**	***Job Costing***	System has the ability to support the closing via a defined work flow process(es)	**1 – Current Functionality**		
WOM.JC.28	**Job Costing**	***Job Costing***	System has the ability to enter, update and close job budget	**1 – Current Functionality**		
WOM.JC.29	**Job Costing**	***Job Costing***	System has the ability to allocate overhead rates to the job cost system?	**1 – Current Functionality**		
WOM.IN.1	**Inventory**	***Inventory Configuration***	Ability to define multiple warehouses	**1 – Current Functionality**		
WOM.IN.2	**Inventory**	***Inventory Configuration***	Ability to define storage location/shelf/bin/etc. within each warehouse (up to 5 levels)	**1 – Current Functionality**		
WOM.IN.3	**Inventory**	***Inventory Configuration***	Ability to define default put away locations for each part	**1 – Current Functionality**		
WOM.IN.4	**Inventory**	***Inventory Configuration***	Ability to define multiple ship-to locations	**1 – Current Functionality**		
WOM.IN.5	**Inventory**	***Inventory Configuration***	Ability to enter new parts (category id's) manually	**1 – Current Functionality**		
WOM.IN.6	**Inventory**	***Inventory Configuration***	Ability to import new parts from spreadsheet	**1 – Current Functionality**		
WOM.IN.7	**Inventory**	***Inventory Configuration***	System checks for duplication during entry or import of new parts (including manufacturer id)	**1 – Current Functionality**		

WOM.IN.8	**Inventory**	***Inventory Configuration***	Ability to sync parts information (Item Master) through integration/api	**1 – Current Functionality**		
WOM.IN.9	**Inventory**	***Inventory Configuration***	Ability to define and designate product families	**1 – Current Functionality**		
WOM.IN.10	**Inventory**	***Inventory Configuration***	Ability to define and designate product categories	**1 – Current Functionality**		
WOM.IN.11	**Inventory**	***Inventory Configuration***	Ability to enter alternate or historical part numbers	**1 – Current Functionality**		
WOM.IN.12	**Inventory**	***Inventory Configuration***	Ability to designate similar items in inventory	**1 – Current Functionality**		
WOM.IN.13	**Inventory**	***Inventory Configuration***	Ability to define and maintain units of measure	**1 – Current Functionality**		
WOM.IN.14	**Inventory**	***Inventory Configuration***	Ability to define and maintain conversions for units of measure	**1 – Current Functionality**		
WOM.IN.15	**Inventory**	***Inventory Configuration***	Ability to apply separate units of measure for ordering/receiving a part and storing/issuing a part	**1 – Current Functionality**		
WOM.IN.16	**Inventory**	***Inventory Configuration***	Ability to maintain a manufacturer id on parts	**1 – Current Functionality**		
WOM.IN.17	**Inventory**	***Inventory Configuration***	Ability to identify a preferred manufacturer	**1 – Current Functionality**		
WOM.IN.18	**Inventory**	***Inventory Configuration***	Ability to maintain serial numbers on parts	**1 – Current Functionality**		
WOM.IN.19	**Inventory**	***Inventory Configuration***	System supports long description fields on parts (up to 256 characters)	**1 – Current Functionality**		
WOM.IN.20	**Inventory**	***Inventory Configuration***	System supports long notes fields on parts (thousands of characters)	**1 – Current Functionality**		
WOM.IN.21	**Inventory**	***Inventory Configuration***	Ability to designate part as obsolete	**1 – Current Functionality**		
WOM.IN.22	**Inventory**	***Inventory Configuration***	Ability to restrict ordering for a particular part	**1 – Current Functionality**		
WOM.IN.23	**Inventory**	***Inventory Configuration***	Ability to calculate and report on average cost per unit	**1 – Current Functionality**		
WOM.IN.24	**Inventory**	***Inventory Configuration***	Ability to print trend reporting on average costs	**1 – Current Functionality**		
WOM.IN.25	**Inventory**	***Inventory Configuration***	Ability to track last purchase price	**1 – Current Functionality**		
WOM.IN.26	**Inventory**	***Inventory Configuration***	Ability to report on cost tolerance, identifying variances in average unit price	**1 – Current Functionality**		
WOM.IN.27	**Inventory**	***Inventory Configuration***	Ability to manually enter standard costs (for estimating)	**1 – Current Functionality**		
WOM.IN.28	**Inventory**	***Inventory Configuration***	Ability to run variance reports on average cost vs standard costs	**1 – Current Functionality**		
WOM.IN.29	**Inventory**	***Inventory Configuration***	Ability to define product specifications for parts	**1 – Current Functionality**		
WOM.IN.30	**Inventory**	***Inventory Configuration***	Ability to define alternate specifications for parts	**1 – Current Functionality**		
WOM.IN.31	**Inventory**	***Inventory Configuration***	Ability to attach documents to part records	**1 – Current Functionality**		
WOM.IN.32	**Inventory**	***Inventory Configuration***	Ability to leverage specifications in purchasing (send documents with purchase order)	**1 – Current Functionality**		
WOM.IN.33	**Inventory**	***Inventory Configuration***	Ability to designate inventory as shared with another utility	**1 – Current Functionality**		
WOM.IN.34	**Inventory**	***Inventory Configuration***	System tracks item changes by user and provides audit reporting	**1 – Current Functionality**		
WOM.IN.35	**Inventory**	***Inventory Configuration***	Ability to report on shared inventory	**1 – Current Functionality**		
WOM.IN.36	**Inventory**	***Inventory Management***	Ability to search for inventory by category id, category, family, manufacturer id, and warehouse	**1 – Current Functionality**		
WOM.IN.37	**Inventory**	***Inventory Management***	Ability to search for inventory remotely	**1 – Current Functionality**		
WOM.IN.38	**Inventory**	***Inventory Management***	Ability to track employee processing a receipt of goods	**1 – Current Functionality**		
WOM.IN.39	**Inventory**	***Inventory Management***	Ability to track employee processing an issuance	**1 – Current Functionality**		
WOM.IN.40	**Inventory**	***Inventory Management***	Ability to track who materials were issued to	**1 – Current Functionality**		
WOM.IN.41	**Inventory**	***Inventory Management***	Ability to enter general ledger account string when inventory is issued	**1 – Current Functionality**	Can define account posting rules for inventory based on different chart of accounts and reporting dimensions	
WOM.IN.42	**Inventory**	***Inventory Management***	Ability to include project and activity codes when issuing inventory	**1 – Current Functionality**		
WOM.IN.43	**Inventory**	***Inventory Management***	Ability to select commonly used general ledger account strings during entry	**1 – Current Functionality**	Can define account posting rules for inventory based on different chart of accounts and reporting dimensions. Can require specific dimensions to be inlcuded on transactions.	
WOM.IN.44	**Inventory**	***Inventory Management***	Ability to split entries into multiple detail lines	**1 – Current Functionality**		
WOM.IN.45	**Inventory**	***Inventory Management***	Ability to transfer items within warehouse to different storage location	**1 – Current Functionality**		
WOM.IN.46	**Inventory**	***Inventory Management***	Ability to transfer items to different warehouse	**1 – Current Functionality**		
WOM.IN.47	**Inventory**	***Inventory Management***	Ability to renumber parts	**1 – Current Functionality**		
WOM.IN.48	**Inventory**	***Inventory Management***	Ability to restrict part renumbering by user/security role	**1 – Current Functionality**		
WOM.IN.49	**Inventory**	***Inventory Management***	Ability to track expensed consumable inventory (e.g., safety glasses).	**1 – Current Functionality**		
WOM.IN.50	**Inventory**	***Inventory Management***	Ability to order and receive non-inventory items	**1 – Current Functionality**		
WOM.IN.51	**Inventory**	***Inventory Management***	Ability to put away, issue, track, and report on non-costed inventory	**1 – Current Functionality**		
WOM.IN.52	**Inventory**	***Inventory Management***	Ability to designate inventory as unowned (e.g. leased items)	**1 – Current Functionality**		
WOM.IN.53	**Inventory**	***Inventory Management***	Ability to designate and track spare part inventory	**1 – Current Functionality**		
WOM.IN.54	**Inventory**	***Inventory Management***	Ability to define re-order points for individual parts for each warehouse	**1 – Current Functionality**		
WOM.IN.55	**Inventory**	***Inventory Management***	Ability to designate seasonal re-order points	**1 – Current Functionality**		
WOM.IN.56	**Inventory**	***Inventory Management***	Ability to set reorder quantities	**1 – Current Functionality**		
WOM.IN.57	**Inventory**	***Inventory Management***	Ability to report on material needs based on reorder points	**1 – Current Functionality**		
WOM.IN.58	**Inventory**	***Inventory Management***	Ability to auto-generate purchase orders based on reorder points	**1 – Current Functionality**		
WOM.IN.59	**Inventory**	***Inventory Management***	Ability to check out items to projects (such as wire reels) and receive them back partially consumed	**1 – Current Functionality**		
WOM.IN.60	**Inventory**	***Inventory Management***	Ability to enter freight, discounts, and other items after receipt already processed (and still properly update average costs)	**1 – Current Functionality**		
WOM.IN.61	**Inventory**	***Inventory Management***	Ability to enter freight and other miscellaneous charges for issued material after issuance is processed	**1 – Current Functionality**		
WOM.IN.62	**Inventory**	***Inventory Management***	Ability to query and report on inventory on-hand, including cat id, qty, manufacturer id, warehouse, location, average price, and category	**1 – Current Functionality**		
WOM.IN.63	**Inventory**	***Inventory Management***	Ability to query and report on inventory ordered, including quantity ordered, back ordered, etc.	**1 – Current Functionality**		
WOM.IN.64	**Inventory**	***Inventory Management***	Ability to create bar code labels and utilize bar code readers in receipt of goods, issuances, transfers, and inventory cycle counts	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.65	**Inventory**	***Inventory Management***	Ability to generate inventory history reports	**1 – Current Functionality**		
WOM.IN.66	**Inventory**	***Inventory Management***	Ability to generate stock status reports	**1 – Current Functionality**		
WOM.IN.67	**Inventory**	***Inventory Management***	Ability to generate purchase history reports	**1 – Current Functionality**		
WOM.IN.68	**Inventory**	***Inventory Management***	Ability to generate issuance history reports	**1 – Current Functionality**		
WOM.IN.69	**Inventory**	***Inventory Management***	Ability to generate backlog reports	**1 – Current Functionality**		
WOM.IN.70	**Inventory**	***Inventory Management***	Ability to generate reserve reports	**1 – Current Functionality**		
WOM.IN.71	**Inventory**	***Inventory Management***	System supports physical inventory process, including cycle-counts	**1 – Current Functionality**		
WOM.IN.72	**Inventory**	***Inventory Management***	System captures date which items were last counted during physical inventory	**1 – Current Functionality**		
WOM.IN.73	**Inventory**	***Inventory Management***	Ability to report on items based on last physical count	**1 – Current Functionality**		
WOM.IN.74	**Inventory**	***Inventory Management***	Workflow for physical inventory reconciliation and approval	**1 – Current Functionality**		
WOM.IN.75	**Inventory**	***Inventory Management***	Ability to sync quantity and put away data through integration/api	**1 – Current Functionality**		
WOM.IN.76	**Inventory**	***Inventory Management***	Ability to create and save inventory queries	**1 – Current Functionality**		
WOM.IN.77	**Inventory**	***Inventory Management***	Ability to export queries into spreadsheet	**1 – Current Functionality**		
WOM.IN.78	**Inventory**	***Inventory Management***	Ability to create and save configured inventory reports	**1 – Current Functionality**		
WOM.IN.79	**Inventory**	***Inventory Management***	Ability to export reports into spreadsheet	**1 – Current Functionality**		
WOM.IN.80	**Inventory**	***Inventory Management***	System supports inventory planning and forecasting	**1 – Current Functionality**		
WOM.IN.81	**Inventory**	***Inventory Management***	Ability to report on inventory forecasts vs. actual inventory used	**1 – Current Functionality**		
WOM.IN.82	**Inventory**	***Inventory Master File***	Ability to provide an on-line master file of inventory items including but not limited to:	**1 – Current Functionality**		
WOM.IN.83	**Inventory**	***Inventory Master File***	a) Equipment	**1 – Current Functionality**		
WOM.IN.84	**Inventory**	***Inventory Master File***	b) Supplies	**1 – Current Functionality**		
WOM.IN.85	**Inventory**	***Inventory Master File***	c) Tools	**1 – Current Functionality**		
WOM.IN.86	**Inventory**	***Inventory Master File***	d) Materials	**1 – Current Functionality**		
WOM.IN.87	**Inventory**	***Inventory Master File***	e) User Defined Criteria	**1 – Current Functionality**		
WOM.IN.88	**Inventory**	***Inventory Master File***	Ability to link stock codes to equipment	**1 – Current Functionality**		
WOM.IN.89	**Inventory**	***Inventory Master File***	Ability to enter, store, and update key data elements for all inventory items including but not limited to:	**1 – Current Functionality**		
WOM.IN.90	**Inventory**	***Inventory Master File***	a) Stock Number	**1 – Current Functionality**		
WOM.IN.91	**Inventory**	***Inventory Master File***	b) Type	**1 – Current Functionality**		
WOM.IN.92	**Inventory**	***Inventory Master File***	c) Description (60 characters)	**1 – Current Functionality**		
WOM.IN.93	**Inventory**	***Inventory Master File***	d) Manufacturer Number and Part Number (30 spaces)	**1 – Current Functionality**		
WOM.IN.94	**Inventory**	***Inventory Master File***	e) Multiple Ship To Locations (i.e. warehouse ID)	**1 – Current Functionality**		
WOM.IN.95	**Inventory**	***Inventory Master File***	f) Bin Number/Shelf number	**1 – Current Functionality**		
WOM.IN.96	**Inventory**	***Inventory Master File***	g) Warranty Information	**1 – Current Functionality**		
WOM.IN.97	**Inventory**	***Inventory Master File***	h) Current Cost (last price paid)	**1 – Current Functionality**		
WOM.IN.98	**Inventory**	***Inventory Master File***	i) Current Cost Date	**1 – Current Functionality**		
WOM.IN.99	**Inventory**	***Inventory Master File***	j) Average Cost	**1 – Current Functionality**		
WOM.IN.100	**Inventory**	***Inventory Master File***	k) Quantity on Hand and Value	**1 – Current Functionality**		
WOM.IN.101	**Inventory**	***Inventory Master File***	l) Quantity Available	**1 – Current Functionality**		
WOM.IN.102	**Inventory**	***Inventory Master File***	m) Quantity on Order	**1 – Current Functionality**		
WOM.IN.103	**Inventory**	***Inventory Master File***	n) Quantity Reserved			
WOM.IN.104	**Inventory**	***Inventory Master File***	o) Reserved By	**1 – Current Functionality**	SpryEngage is a comprehensive customer self-service platform which is designed to provide all of these services through a single, tightly-branded and integrated platform. It allows your customers to access all these services through a single login.	
WOM.IN.105	**Inventory**	***Inventory Master File***	p) Unit of Measure for Purchase	**1 – Current Functionality**		
WOM.IN.106	**Inventory**	***Inventory Master File***	q) Unit of Measure for Issue	**1 – Current Functionality**		
WOM.IN.107	**Inventory**	***Inventory Master File***	r) User Defined	**1 – Current Functionality**		
WOM.IN.108	**Inventory**	***Inventory Master File***	s) Obsolete Item	**1 – Current Functionality**		
WOM.IN.109	**Inventory**	***Inventory Master File***	t) Capital Project	**1 – Current Functionality**		
WOM.IN.110	**Inventory**	***Inventory Master File***	u) Reorder Point	**1 – Current Functionality**		
WOM.IN.111	**Inventory**	***Inventory Master File***	v) Expiration Date	**1 – Current Functionality**		
WOM.IN.112	**Inventory**	***Inventory Master File***	w) Reorder Quantity	**1 – Current Functionality**		
WOM.IN.113	**Inventory**	***Inventory Master File***	y) Dimensions	**1 – Current Functionality**		
WOM.IN.114	**Inventory**	***Inventory Master File***	z) Weight	**1 – Current Functionality**		
WOM.IN.115	**Inventory**	***Inventory Master File***	aa) Slang or Colloquial Name	**1 – Current Functionality**		
WOM.IN.116	**Inventory**	***Inventory Master File***	bb) Tax Percentage	**1 – Current Functionality**		
WOM.IN.117	**Inventory**	***Inventory Master File***	cc) Property Tag Number	**1 – Current Functionality**		
WOM.IN.118	**Inventory**	***Inventory Master File***	dd) Budget Code/GL Code	**1 – Current Functionality**	This occurs in the back-end of Workday based on account posting rules by dimension	
WOM.IN.119	**Inventory**	***Inventory Master File***	ee) Image of item	**1 – Current Functionality**	Stored as an attachment	

WOM.IN.120	**Inventory**	***Inventory Master File***	ff) Cross Reference Stock #	**1 – Current Functionality**		
WOM.IN.121	**Inventory**	***Inventory Master File***	gg) Type of shipment	**1 – Current Functionality**		
WOM.IN.122	**Inventory**	***Inventory Master File***	hh) esimated lead time	**1 – Current Functionality**		
WOM.IN.123	**Inventory**	***Inventory Master File***	ii) Reel # or Roll #	**1 – Current Functionality**		
WOM.IN.124	**Inventory**	***Inventory Master File***	jj) Desired Quantity	**1 – Current Functionality**		
WOM.IN.125	**Inventory**	***Inventory Master File***	Ability to have up to 20 user defined fields	**4 – Modification Required**	Require further clarification. Workday has several pre-defined fields that meet requirements. Additionally, can add comments to item, or create custom fields as needed.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.126	**Inventory**	***Inventory Master File***	Ability to enter, store, update and process an unlimited inventory item list	**1 – Current Functionality**		
WOM.IN.127	**Inventory**	***Inventory Master File***	Ability to accommodate an unlimited number of rows/bins per location, department or company	**1 – Current Functionality**		
WOM.IN.128	**Inventory**	***Inventory Master File***	Ability to enter, store, and update inventory quantities up to 8 positions in length (i.e. 99,999,999).	**1 – Current Functionality**		
WOM.IN.129	**Inventory**	***Inventory Master File***	Ability to track parts by but not limited to:	**1 – Current Functionality**		
WOM.IN.130	**Inventory**	***Inventory Master File***	a) Retired Part Number	**1 – Current Functionality**		
WOM.IN.131	**Inventory**	***Inventory Master File***	b) Superseded Part Number	**1 – Current Functionality**		
WOM.IN.132	**Inventory**	***Inventory Master File***	c) Manufacturer (30 spaces)	**1 – Current Functionality**		
WOM.IN.133	**Inventory**	***Inventory Master File***	d) Size	**1 – Current Functionality**		
WOM.IN.134	**Inventory**	***Inventory Master File***	e) User Defined Criteria	**1 – Current Functionality**		
WOM.IN.135	**Inventory**	***Inventory Master File***	f) Company (System)	**1 – Current Functionality**		
WOM.IN.136	**Inventory**	***Inventory Master File***	g) Department	**1 – Current Functionality**		
WOM.IN.137	**Inventory**	***Inventory Master File***	Ability to classify items including but not limited to:	**1 – Current Functionality**		
WOM.IN.138	**Inventory**	***Inventory Master File***	a) Active	**1 – Current Functionality**		
WOM.IN.139	**Inventory**	***Inventory Master File***	b) Stock	**1 – Current Functionality**		
WOM.IN.140	**Inventory**	***Inventory Master File***	c) Stockless	**1 – Current Functionality**		
WOM.IN.141	**Inventory**	***Inventory Master File***	d) Deactivated	**1 – Current Functionality**		
WOM.IN.142	**Inventory**	***Inventory Master File***	e) Spares	**1 – Current Functionality**		
WOM.IN.143	**Inventory**	***Inventory Master File***	f) Reliability	**1 – Current Functionality**		
WOM.IN.144	**Inventory**	***Inventory Master File***	g) User Defined	**1 – Current Functionality**		
WOM.IN.145	**Inventory**	***Inventory Master File***	h) Tested/Not Tested	**1 – Current Functionality**		
WOM.IN.146	**Inventory**	***Inventory Master File***	i) Committed	**1 – Current Functionality**		
WOM.IN.147	**Inventory**	***Inventory Master File***	j) Exempt/Nonexempt	**1 – Current Functionality**		
WOM.IN.148	**Inventory**	***Inventory Master File***	Ability to import and store data from the parts catalog of all major vendors	**1 – Current Functionality**		
WOM.IN.149	**Inventory**	***Inventory Master File***	Ability to drill down and up from a selected piece of equipment to parts	**1 – Current Functionality**		
WOM.IN.150	**Inventory**	***Inventory Master File***	Ability to scan images of the following as part of the transaction history including but not limited to:	**1 – Current Functionality**		
WOM.IN.151	**Inventory**	***Inventory Master File***	a) Packing Slips	**1 – Current Functionality**		
WOM.IN.152	**Inventory**	***Inventory Master File***	b) Invoices	**1 – Current Functionality**		
WOM.IN.153	**Inventory**	***Inventory Master File***	c) MSDS (material data safety sheets)	**1 – Current Functionality**		
WOM.IN.154	**Inventory**	***Inventory Master File***	d) Miscellaneous Documentation	**1 – Current Functionality**		
WOM.IN.155	**Inventory**	***Inventory Master File***	e) Image	**1 – Current Functionality**	As an attchement.	
WOM.IN.156	**Inventory**	***Inventory Master File***	Ability to lock down inventory or item for physical inventory and for cycle counting	**1 – Current Functionality**		
WOM.IN.157	**Inventory**	***Inventory Master File***	Ability to conduct cycle counting without locking down warehouse inventory	**1 – Current Functionality**		
WOM.IN.158	**Inventory**	***Inventory Master File***	Ability to receive, issue and count items by bar code scanner or Radio Frequencies from multiple locations	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.159	**Inventory**	***Inventory Master File***	Ability to convert purchased unit of measure to stocked/delivered unit of measure	**1 – Current Functionality**		
WOM.IN.160	**Inventory**	***Inventory Master File***	Ability to track and adjust levels of inventory for items	**1 – Current Functionality**		
WOM.IN.161	**Inventory**	***Inventory Master File***	Ability to default which GL accounting code that will be used when adjusting inventory, with ability to override	**1 – Current Functionality**		
WOM.IN.162	**Inventory**	***Inventory Master File***	Ability to search for items by but not limited to:	**1 – Current Functionality**		
WOM.IN.163	**Inventory**	***Inventory Master File***	a) Type	**1 – Current Functionality**		
WOM.IN.164	**Inventory**	***Inventory Master File***	b) Vendor/Supplier	**1 – Current Functionality**		
WOM.IN.165	**Inventory**	***Inventory Master File***	c) Partial Description	**1 – Current Functionality**		
WOM.IN.166	**Inventory**	***Inventory Master File***	d) Manufacturer	**1 – Current Functionality**		
WOM.IN.167	**Inventory**	***Inventory Master File***	e) Manufacturer Part Number	**1 – Current Functionality**		
WOM.IN.168	**Inventory**	***Inventory Master File***	f) Inventory Stock Code	**1 – Current Functionality**		
WOM.IN.169	**Inventory**	***Inventory Master File***	g) Slang or Colloquial Name	**1 – Current Functionality**		
WOM.IN.170	**Inventory**	***Inventory Master File***	h) Group	**1 – Current Functionality**	Workday supports several types of roles – the primary being organization roles that control which information can be accessed, and the actions a specific user (member of that role) can perform on the members of that organization. Within the organization definition, you specify the individual role(s) that are required for that organization and roles from higher level organizations will automatically be inherited. Additionally, for any role – you can choose to override the current occupant with another worker making it specific to that organization and its subsidiaries. Workday also supports several process-maintained roles such as Employee, Contingent, and System user – these roles are assigned & revoked automatically by Workday based on system processes like Hire, Contract Contingent, and Terminate. Lastly, Workday supports administrative roles that are assigned by a security partner to specific users – these roles tend to control administrative features of the system like creating new organizations, setting up and maintaining security, etc. In sum, Workday has a robust set of	
WOM.IN.171	**Inventory**	***Inventory Master File***	i) Class	**1 – Current Functionality**		
WOM.IN.172	**Inventory**	***Inventory Master File***	j) Manufacturer Pneumonic	**1 – Current Functionality**		
WOM.IN.173	**Inventory**	***Inventory Master File***	k) Equipment	**1 – Current Functionality**		
WOM.IN.174	**Inventory**	***Inventory Master File***	l) User Defined	**1 – Current Functionality**		
WOM.IN.175	**Inventory**	***Inventory Master File***	m) Reel # or Roll #	**1 – Current Functionality**		
WOM.IN.176	**Inventory**	***Inventory Master File***	Ability to use wildcard searches	**1 – Current Functionality**		
WOM.IN.177	**Inventory**	***Inventory Master File***	Ability to view current status of item(s) on-line including but not limited to:	**1 – Current Functionality**		
WOM.IN.178	**Inventory**	***Inventory Master File***	a) Stock on Hand	**1 – Current Functionality**		
WOM.IN.179	**Inventory**	***Inventory Master File***	b) Due In	**1 – Current Functionality**	Included with Bill Template Design	
WOM.IN.180	**Inventory**	***Inventory Master File***	c) Due Out	**1 – Current Functionality**	Included with Bill Template Design	
WOM.IN.181	**Inventory**	***Inventory Master File***	d) Committed/Pledged	**1 – Current Functionality**		
WOM.IN.182	**Inventory**	***Inventory Master File***	e) Transfer	**1 – Current Functionality**		
WOM.IN.183	**Inventory**	***Inventory Master File***	f) Available	**1 – Current Functionality**		
WOM.IN.184	**Inventory**	***Inventory Master File***	Ability to view stock on hand at the following levels but not limited to:	**1 – Current Functionality**		
WOM.IN.185	**Inventory**	***Inventory Master File***	a) Warehouse	**1 – Current Functionality**		
WOM.IN.186	**Inventory**	***Inventory Master File***	b) Company	**1 – Current Functionality**		
WOM.IN.187	**Inventory**	***Inventory Master File***	c) Company Wide	**1 – Current Functionality**		
WOM.IN.188	**Inventory**	***Inventory Master File***	d) User Defined	**1 – Current Functionality**		
WOM.IN.189	**Inventory**	***Inventory Master File***	Ability to use electronic signature capabilities	**1 – Current Functionality**		
WOM.IN.190	**Inventory**	***Inventory Master File***	Ability to associate effective and expiration dates with each electronic signature	**1 – Current Functionality**		
WOM.IN.191	**Inventory**	***Inventory Master File***	Ability to enter, store, and update key order and reorder information for all inventory items including but not limited to:	**1 – Current Functionality**		
WOM.IN.192	**Inventory**	***Inventory Master File***	a) Date Ordered	**1 – Current Functionality**		
WOM.IN.193	**Inventory**	***Inventory Master File***	b) Name of Employee Initiating Order	**1 – Current Functionality**		
WOM.IN.194	**Inventory**	***Inventory Master File***	c) Reorder Point and Quantity	**1 – Current Functionality**		
WOM.IN.195	**Inventory**	***Inventory Master File***	d) Reorder Lead Time	**1 – Current Functionality**		
WOM.IN.196	**Inventory**	***Inventory Master File***	e) User Defined Criteria	**1 – Current Functionality**		
WOM.IN.197	**Inventory**	***Inventory Master File***	f) Estimated Delivery Date	**1 – Current Functionality**		
WOM.IN.198	**Inventory**	***Inventory Master File***	g) Revised Delivery Date	**1 – Current Functionality**		
WOM.IN.199	**Inventory**	***Inventory Master File***	h) Buyer	**1 – Current Functionality**		
WOM.IN.200	**Inventory**	***Inventory Master File***	i) Stated and Actual Lead Time	**1 – Current Functionality**		
WOM.IN.201	**Inventory**	***Inventory Master File***	j) Purchase Order	**1 – Current Functionality**		
WOM.IN.202	**Inventory**	***Inventory Master File***	Ability to prevent order / reorder of deactivated stock codes	**1 – Current Functionality**		
WOM.IN.203	**Inventory**	***Inventory Master File***	Ability to define reorder for a main location or at the warehouse level	**1 – Current Functionality**		
WOM.IN.204	**Inventory**	***Inventory Master File***	Ability to define multiple reorder quantities by date	**1 – Current Functionality**		
WOM.IN.205	**Inventory**	***Inventory Master File***	Ability to enter, store, and update multiple manufacturers and corresponding part number for each item	**1 – Current Functionality**		
WOM.IN.206	**Inventory**	***Inventory Master File***	Ability to adjust item cost automatically based on purchasing and accounts payable adjustments	**1 – Current Functionality**		
WOM.IN.207	**Inventory**	***Inventory Master File***	Ability to set safety stock level	**1 – Current Functionality**		
WOM.IN.208	**Inventory**	***Inventory Master File***	Ability to enter, store, and update same part with different part and drawing number	**1 – Current Functionality**		
WOM.IN.209	**Inventory**	***Inventory Master File***	Ability to identify exempt/nonexempt items	**1 – Current Functionality**		
WOM.IN.210	**Inventory**	***Inventory Master File***	Ability to enter, store, and update inventory dollar amounts up to 8 positions in length (i.e.$ 99,999,999).	**1 – Current Functionality**		
WOM.IN.211	**Inventory**	***Inventory Master File***	Ability of system to have multiple inventory items assemblied and tracked in system. (Assembly Units, Kits, Parent/Child etc.)	**1 – Current Functionality**		
WOM.IN.212	**Inventory**	***Inventory Master File***	Ability to show transformers and meters at cost until transferred to Asset inventory	**1 – Current Functionality**		
WOM.IN.213	**Inventory**	***Inventory Master File***	Ability of system to group like inventory items and report on those items.	**1 – Current Functionality**		

WOM.IN.214	**Inventory**	***Control Requirements (Inventory Cont***	Ability to enter, store, and update the following information but not limited to:	**1 – Current Functionality**		
WOM.IN.215	**Inventory**	***Control Requirements (Inventory Cont***	a) Serial Number	**1 – Current Functionality**		
WOM.IN.216	**Inventory**	***Control Requirements (Inventory Cont***	b) Lot Number	**1 – Current Functionality**		
WOM.IN.217	**Inventory**	***Control Requirements (Inventory Cont***	c) Reel Quantity and Reel Number	**1 – Current Functionality**		
WOM.IN.218	**Inventory**	***Control Requirements (Inventory Cont***	d) Link to Purchase Order	**1 – Current Functionality**		
WOM.IN.219	**Inventory**	***Control Requirements (Inventory Cont***	e) Link to Work Order	**1 – Current Functionality**		
WOM.IN.220	**Inventory**	***Control Requirements (Inventory Cont***	Ability to automatically generate appropriate GL transaction(s) when an adjustment is made to the stock level	**1 – Current Functionality**		
WOM.IN.221	**Inventory**	***Control Requirements (Inventory Cont***	Ability to validate returned items that are allocated to the same GL account number(s), Work/Job # as the issuing GL account number(s),Work/Job #	**1 – Current Functionality**		
WOM.IN.222	**Inventory**	***Control Requirements (Inventory Cont***	Ability to automatically update associated purchasing and inventory components when a change occurs (i.e. Purchase order price change average inventory cost)	**1 – Current Functionality**		
WOM.IN.223	**Inventory**	***Control Requirements (Inventory Cont***	Ability to automatically issue an alert (or flag) when an item quantity on hand falls below it's defined minimum	**1 – Current Functionality**		
WOM.IN.224	**Inventory**	***Control Requirements (Inventory Cont***	Ability to view bin inventory levels on-line or in a report	**1 – Current Functionality**		
WOM.IN.225	**Inventory**	***Control Requirements (Inventory Cont***	Ability to user define thresholds for item cost adjustment including but not limited to:	**1 – Current Functionality**		
WOM.IN.226	**Inventory**	***Control Requirements (Inventory Cont***	a) Current Cost	**1 – Current Functionality**		
WOM.IN.227	**Inventory**	***Control Requirements (Inventory Cont***	b) Time	**1 – Current Functionality**	Fully Supported.	
WOM.IN.228	**Inventory**	***Control Requirements (Inventory Cont***	Ability to allow users to enter quantity adjustment then automatically route to inventory control for approval	**1 – Current Functionality**		
WOM.IN.229	**Inventory**	***Control Requirements (Inventory Cont***	Ability to define approval process for inventory adjustments	**1 – Current Functionality**		
WOM.IN.230	**Inventory**	***Control Requirements (Inventory Cont***	Ability to monitor planned maintenance date on equipment	**1 – Current Functionality**		
WOM.IN.231	**Inventory**	***Control Requirements (Inventory Cont***	Ability to define goods receipt tolerances	**1 – Current Functionality**		
WOM.IN.232	**Inventory**	***Control Requirements (Inventory Cont***	Ability to define varying authority levels for inventory approval at the organizational level, department, workgroup and individual level	**1 – Current Functionality**		
WOM.IN.233	**Inventory**	***Control Requirements (Inventory Cont***	Ability to calculate true inventory turns by warehouse and company	**1 – Current Functionality**		
WOM.IN.234	**Inventory**	***Control Requirements (Inventory Cont***	Ability to generate automatic notification on a status change of any part	**1 – Current Functionality**		
WOM.IN.235	**Inventory**	***Control Requirements (Inventory Cont***	Ability to automatically calculate reorder point with ability to override by item; any change will notify staff	**1 – Current Functionality**		
WOM.IN.236	**Inventory**	***Control Requirements (Inventory Cont***	Ability to validate materials are being checked out to a valid work/job order, GL account code	**1 – Current Functionality**		
WOM.IN.237	**Inventory**	***Control Requirements (Inventory Cont***	Ability of system to enter, store and update inventory items in multiple warehouse locations including truck inventory.	**1 – Current Functionality**		
WOM.IN.238	**Inventory**	***Control Requirements (Inventory Cont***	Ability of system to support a cycle count inventory process including but not limited to:	**1 – Current Functionality**		
WOM.IN.239	**Inventory**	***Control Requirements (Inventory Cont***	a) System selects uncounted inventory	**1 – Current Functionality**		
WOM.IN.240	**Inventory**	***Control Requirements (Inventory Cont***	b) System print worksheets for count	**1 – Current Functionality**		
WOM.IN.241	**Inventory**	***Control Requirements (Inventory Cont***	c) System tracks previously selected inventory and allow for all inventory items to be counted at least twice a year	**1 – Current Functionality**		
WOM.IN.242	**Inventory**	***Control Requirements (Inventory Cont***	d) System will allow updated inventory totals to be enter either from a hand held device or workstation.	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.243	**Inventory**	***Control Requirements (Inventory Cont***	e) Cycle count reports that capture locations counted, gain/loss statistic that include total gains and total losses individualyy, accuracy % associated both with materials inventory and cost.	**1 – Current Functionality**		
WOM.IN.244	**Inventory**	***Control Requirements (Inventory Cont***	Ability of system to release stock from a mobile device	**1 – Current Functionality**		
WOM.IN.245	**Inventory**	***Control Requirements (Inventory Cont***	a) Ability to track surplus assets for decoration, selling and disposal.	**1 – Current Functionality**		
WOM.IN.246	**Inventory**	***Control Requirements (Inventory Cont***	b) Ability to create invoices and save to asset.	**1 – Current Functionality**		
WOM.IN.247	**Inventory**	***Control Requirements (Inventory Cont***	c) Ability to attach photos and buyers certificates to the asset.	**1 – Current Functionality**	File Attachment.	
WOM.IN.248	**Inventory**	***Control Requirements (Inventory Cont***	d) Ability to identify dispostion, track and move assets from one department to another as items internally transfer	**1 – Current Functionality**		
WOM.IN.249	**Inventory**	***Control Requirements (Inventory Cont***	e) Ability to prepare scrap invoices.	**1 – Current Functionality**		
WOM.IN.250	**Inventory**	***Control Requirements (Inventory Cont***	f) Ability to track scrap sales, weight and price.	**1 – Current Functionality**		
WOM.IN.251	**Inventory**	***Control Requirements (Inventory Cont***	Ability of system to track inventory returns from Work Order it was issued from originally.	**1 – Current Functionality**	SpryMobile	
WOM.IN.252	**Inventory**	***Control Requirements (Inventory Cont***	Ability of system to support an inventory dashboard including but not limited to: trend reports and goal analysis	**1 – Current Functionality**		
WOM.IN.253	**Inventory**	***Inventory Processing***	Ability to enter, store, and update electronic forms and work orders with the option to print	**1 – Current Functionality**		
WOM.IN.254	**Inventory**	***Inventory Processing***	Ability to automatically reorder when balances reach reorder point with notification	**1 – Current Functionality**		
WOM.IN.255	**Inventory**	***Inventory Processing***	Ability to manually override the reorder point for any item at anytime	**1 – Current Functionality**		
WOM.IN.256	**Inventory**	***Inventory Processing***	Ability to determine the average lead time to receive an item for use in determining reorder lead time	**1 – Current Functionality**		
WOM.IN.257	**Inventory**	***Inventory Processing***	Ability to have one or more delivery schedules with individual prices per delivery	**1 – Current Functionality**	You can use Workday to track packages you receive from a supplier to the their final destination, including intermediate stops during goods delivery. We provide greater detail about package status and enable a requester to track where their requisitioned goods are along with carrier tracking information. You can also use Workday to respond to inquiries about the location of your purchase orders.	
WOM.IN.258	**Inventory**	***Inventory Processing***	Ability to enter, store, and update multiple prices per item per delivery	**1 – Current Functionality**	Can update via supplier invoice adjustment.	
WOM.IN.259	**Inventory**	***Inventory Processing***	Ability to track approvals from different departments/participants	**1 – Current Functionality**		
WOM.IN.260	**Inventory**	***Inventory Processing***	Ability to interface with transportation company to track ship time and in transit location of freight	**1 – Current Functionality**		
WOM.IN.261	**Inventory**	***Inventory Processing***	Ability to distinguish between item costs including freight and item costs without freight	**1 – Current Functionality**		
WOM.IN.262	**Inventory**	***Inventory Processing***	Ability to freeze costs on certain items	**1 – Current Functionality**		
WOM.IN.263	**Inventory**	***Inventory Processing***	Ability to allocate costs to a specific job or work order	**1 – Current Functionality**		
WOM.IN.264	**Inventory**	***Inventory Processing***	Ability to enter, store, and update multiple costs from multiple vendors/suppliers for the same item	**1 – Current Functionality**		
WOM.IN.265	**Inventory**	***Inventory Processing***	Ability of system to interface with vendor/supplier on items to be received and projected inventory levels	**1 – Current Functionality**		
WOM.IN.266	**Inventory**	***Inventory Processing***	Ability to mark items as used but has value as a spare part	**1 – Current Functionality**		
WOM.IN.267	**Inventory**	***Inventory Processing***	Ability to track and report offsite inventory	**4 – Modification Required**	Done via integrations or extend app.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.268	**Inventory**	***Inventory Processing***	Ability to define cycle count criteria including but not limited to:	**1 – Current Functionality**		
WOM.IN.269	**Inventory**	***Inventory Processing***	a) Criticality of Stock Item	**1 – Current Functionality**		
WOM.IN.270	**Inventory**	***Inventory Processing***	b) Frequency	**1 – Current Functionality**		
WOM.IN.271	**Inventory**	***Inventory Processing***	c) Location	**1 – Current Functionality**		
WOM.IN.272	**Inventory**	***Inventory Processing***	d) Dollar Amounts	**1 – Current Functionality**		
WOM.IN.273	**Inventory**	***Inventory Processing***	e) User Defined	**1 – Current Functionality**		
WOM.IN.274	**Inventory**	***Inventory Processing***	Ability to enter, store, update and cross reference repair maintenance cost	**1 – Current Functionality**		
WOM.IN.275	**Inventory**	***Inventory Processing***	Ability to apply sales tax	**1 – Current Functionality**		
WOM.IN.276	**Inventory**	***Inventory Processing***	Ability to support multi tax levels	**1 – Current Functionality**		
WOM.IN.277	**Inventory**	***Inventory Processing***	Ability to do batch updates to inventory records based on specified criteria	**1 – Current Functionality**		
WOM.IN.278	**Inventory**	***Inventory Processing***	Ability to add overhead costs based on transaction type	**1 – Current Functionality**		
WOM.IN.279	**Inventory**	***Inventory Processing***	Ability to manage consignment inventory	**1 – Current Functionality**	Workday enables you to set up and hold goods in your inventory at zero cost when you have a consignment agreement with your vendors. Workday recognizes liability for the goods when they're issued from inventory.	
WOM.IN.280	**Inventory**	***Inventory Processing***	Ability to manage vendor held stock	**4 – Modification Required**	Done via integrations if managing inventory between two systems.	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.281	**Inventory**	***Inventory Processing***	Ability to automatically initiate a requisition when demand occurs for out of stock items	**1 – Current Functionality**		
WOM.IN.282	**Inventory**	***Inventory Processing***	Ability to track scheduled and unscheduled usage	**1 – Current Functionality**		
WOM.IN.283	**Inventory**	***Inventory Processing***	Ability to maintain stock (add, delete, merge)	**1 – Current Functionality**		
WOM.IN.284	**Inventory**	***Inventory Processing***	Ability of system to issue from negative stock levels.	**1 – Current Functionality**		
WOM.IN.285	**Inventory**	***Receiving Activities***	Ability to enter, store, and update key data elements for receiving including but not limited to:	**1 – Current Functionality**		
WOM.IN.286	**Inventory**	***Receiving Activities***	a) Date Entered into Inventory	**1 – Current Functionality**		
WOM.IN.287	**Inventory**	***Receiving Activities***	b) Quantity Received	**1 – Current Functionality**		
WOM.IN.288	**Inventory**	***Receiving Activities***	c) Purchase Order Number	**1 – Current Functionality**		
WOM.IN.289	**Inventory**	***Receiving Activities***	d) Received By	**1 – Current Functionality**		
WOM.IN.290	**Inventory**	***Receiving Activities***	e) Received Date	**1 – Current Functionality**		
WOM.IN.291	**Inventory**	***Receiving Activities***	f) Processing Date	**1 – Current Functionality**	This is standard functionality in the report writer, which Workday consider standard functionality as part of our subscription.	
WOM.IN.292	**Inventory**	***Receiving Activities***	g) Vendor/Supplier Name and Number	**1 – Current Functionality**		
WOM.IN.293	**Inventory**	***Receiving Activities***	h) Inventory Stock Code	**1 – Current Functionality**		
WOM.IN.294	**Inventory**	***Receiving Activities***	h) Inventory Stock Code	**1 – Current Functionality**		
WOM.IN.295	**Inventory**	***Receiving Activities***	j) Quality Problems	**1 – Current Functionality**		
WOM.IN.296	**Inventory**	***Receiving Activities***	k) Expiration Date	**1 – Current Functionality**		
WOM.IN.297	**Inventory**	***Receiving Activities***	l) Discrepancy	**1 – Current Functionality**		
WOM.IN.298	**Inventory**	***Receiving Activities***	m) User Defined	**1 – Current Functionality**		
WOM.IN.299	**Inventory**	***Receiving Activities***	n) Notes	**1 – Current Functionality**	Configurable Worktag	
WOM.IN.300	**Inventory**	***Receiving Activities***	Ability to track transit time and dates	**1 – Current Functionality**		
WOM.IN.301	**Inventory**	***Receiving Activities***	Ability to assign an internal status code to items before releasing into available inventory including but not limited to:	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.302	**Inventory**	***Receiving Activities***	a) In-house	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.303	**Inventory**	***Receiving Activities***	b) Failed	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.304	**Inventory**	***Receiving Activities***	c) Quality Issue	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.305	**Inventory**	***Receiving Activities***	d) Inspection Pending	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**

WOM.IN.306	**Inventory**	***Receiving Activities***	e) Verification Pending	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.307	**Inventory**	***Receiving Activities***	f) Pending Department Inspection.	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.308	**Inventory**	***Receiving Activities***	Ability to assign an internal location code to items before releasing into available inventory including but not limited to:	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.309	**Inventory**	***Receiving Activities***	a) Warehouse	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.310	**Inventory**	***Receiving Activities***	b) Depot	**4 – Modification Required**	Requires a custom field with required options- can be added to Workday	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.311	**Inventory**	***Receiving Activities***	c) User Defined	**1 – Current Functionality**	v	
WOM.IN.312	**Inventory**	***Receiving Activities***	Ability to support receiving activities for but not limited to:	**1 – Current Functionality**		
WOM.IN.313	**Inventory**	***Receiving Activities***	a) Raw Materials	**1 – Current Functionality**		
WOM.IN.314	**Inventory**	***Receiving Activities***	b) Office Supplies	**1 – Current Functionality**	Policy and procedure when it comes to office supplies would be delivered as part of the same onboarding processes outlined in earlier responses. It can also be delivered via Workday Help as outlined previously.	
WOM.IN.315	**Inventory**	***Receiving Activities***	c) Fixed Assets	**1 – Current Functionality**	The Business Process Framework is a flexible, configurable framework that gives customers a complete view ***across all functional areas***. It enables customers to configure and maintain core process flows within the Workday service to connect people, applications, and services. The Business Process Framework is at the heart of Workday application functionality where all transaction-related changes to data originate and are processed. The Business Process Framework is more than just a process definition configuration tool. It also provides a robust run-time engine that evaluates process definitions, roles, steps, and condition rules to determine the routing logic for each event. In this way, it ensures that all business-related events are routed to the right resources at the right time while providing a comprehensive, perpetual audit trail of all changes made during the life of the event. Business processes are at the core of Workday functionality. Process flows that typically would require programming by skilled IT staff in other solutions are instead accomplished via configuration in Workday business process definitions. Customers can make these changes without complex	
WOM.IN.316	**Inventory**	***Receiving Activities***	d) Off-Site Processing Operations	**1 – Current Functionality**	Workday will request users to select the appropiate inventory site to put inventory items.	
WOM.IN.317	**Inventory**	***Receiving Activities***	e) Sub Assemblies	**1 – Current Functionality**	Workday will request users to select the appropiate inventory site to put inventory items.	
WOM.IN.318	**Inventory**	***Receiving Activities***	f) Inventory Stock Item	**1 – Current Functionality**	Workday will request users to select the appropiate inventory site to put inventory items.	
WOM.IN.319	**Inventory**	***Receiving Activities***	g) Returns From Jobs / Work Orders	**1 – Current Functionality**	Workday will request users to select the appropiate inventory site to put inventory items.	
WOM.IN.320	**Inventory**	***Receiving Activities***	h) Transfers	**1 – Current Functionality**	Workday will request users to select the appropiate inventory site to put inventory items.	
WOM.IN.321	**Inventory**	***Receiving Activities***	i) User Defined	**1 – Current Functionality**	Workday will request users to select the appropiate inventory site to put inventory items.	
WOM.IN.322	**Inventory**	***Receiving Activities***	Ability to scan images of the following including but not limited to:	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.323	**Inventory**	***Receiving Activities***	a) Packing Slips	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.324	**Inventory**	***Receiving Activities***	b) Invoices	**1 – Current Functionality**		
WOM.IN.325	**Inventory**	***Receiving Activities***	c) Material Safety Data Sheet (MSDS)	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.326	**Inventory**	***Receiving Activities***	d) Miscellaneous Documentation	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.327	**Inventory**	***Receiving Activities***	Ability to update quantity on-hand real-time	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.328	**Inventory**	***Receiving Activities***	Ability to automatically notify departments of availability	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.329	**Inventory**	***Receiving Activities***	Ability to generate appropriate GL transactions for but not limited to:	**1 – Current Functionality**		
WOM.IN.330	**Inventory**	***Receiving Activities***	a) User Defined	**1 – Current Functionality**		
WOM.IN.331	**Inventory**	***Receiving Activities***	b) Job	**1 – Current Functionality**		
WOM.IN.332	**Inventory**	***Receiving Activities***	c) Work Activity	**1 – Current Functionality**		
WOM.IN.333	**Inventory**	***Receiving Activities***	d) GL Account Number	**1 – Current Functionality**		
WOM.IN.334	**Inventory**	***Receiving Activities***	Ability to automatically update the Purchase Order System	**1 – Current Functionality**		
WOM.IN.335	**Inventory**	***Receiving Activities***	Ability to print bar codes for any non-bar coded items	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.336	**Inventory**	***Receiving Activities***	Ability to receive items by bar code scanner from multiple locations	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.337	**Inventory**	***Receiving Activities***	Ability to drill down on an item to the scanned copy of receiving report or packing slip	**4 – Modification Required**	Can be managed in Workday, but require an integration with a bar code vendor for scanning	**MUST INCLUDE EXPLANATION & COST ESTIMATION**
WOM.IN.338	**Inventory**	***Receiving Activities***	Ability for the receiving person to enter receiving reports/packing slips from multiple locations	**1 – Current Functionality**		
WOM.IN.339	**Inventory**	***Receiving Activities***	Ability to use different unit of measure for same item	**1 – Current Functionality**		
WOM.IN.340	**Inventory**	***Receiving Activities***	Ability to track inventory transactions for a user defined period	**1 – Current Functionality**		
WOM.IN.341	**Inventory**	***Receiving Activities***	Ability to receive multiple shipments under the same purchase order	**1 – Current Functionality**		
WOM.IN.342	**Inventory**	***Receiving Activities***	Ability to view outstanding/received items under same purchase order on-line	**1 – Current Functionality**		
WOM.IN.343	**Inventory**	***Receiving Activities***	Ability to update purchase to pay system	**1 – Current Functionality**		
WOM.IN.344	**Inventory**	***Receiving Activities***	Ability to produce a Report that displays at a user defined timeframe prior to the items delivery	**1 – Current Functionality**		
WOM.IN.345	**Inventory**	***Withdrawal Activities***	Ability to support withdrawal activities for but not limited to:	**1 – Current Functionality**		
WOM.IN.346	**Inventory**	***Withdrawal Activities***	a) Internal Requisitions	**1 – Current Functionality**		
WOM.IN.347	**Inventory**	***Withdrawal Activities***	b) Warranty Returns to Vendors/Suppliers	**1 – Current Functionality**		
WOM.IN.348	**Inventory**	***Withdrawal Activities***	c) Sold to Customer	**1 – Current Functionality**		
WOM.IN.349	**Inventory**	***Withdrawal Activities***	d) Job	**1 – Current Functionality**		
WOM.IN.350	**Inventory**	***Withdrawal Activities***	e) Work Activity	**1 – Current Functionality**		
WOM.IN.351	**Inventory**	***Withdrawal Activities***	f) Repairs	**1 – Current Functionality**		
WOM.IN.352	**Inventory**	***Withdrawal Activities***	g) Scrap / Obsolete Material	**1 – Current Functionality**		
WOM.IN.353	**Inventory**	***Withdrawal Activities***	Ability to update quantity on-hand (real-time) as withdrawals occur	**1 – Current Functionality**		
WOM.IN.354	**Inventory**	***Withdrawal Activities***	Ability to withdraw more than items on-hand	**1 – Current Functionality**		
WOM.IN.355	**Inventory**	***Withdrawal Activities***	Ability to commit inventory	**1 – Current Functionality**		
WOM.IN.356	**Inventory**	***Withdrawal Activities***	Ability to enter, store, update and view the status of reserved inventory on-line or through a report	**1 – Current Functionality**		
WOM.IN.357	**Inventory**	***Withdrawal Activities***	Ability to classify withdrawal types (i.e. reserved, field delivery, scheduled, nonscheduled)	**1 – Current Functionality**		
WOM.IN.358	**Inventory**	***Withdrawal Activities***	Ability to modify requisitions until time of pulling material	**1 – Current Functionality**		
WOM.IN.359	**Inventory**	***Withdrawal Activities***	Ability to define warehouse shelf life	**1 – Current Functionality**		
WOM.IN.360	**Inventory**	***Withdrawal Activities***	Ability to generate a ticket to be used to pull inventory	**1 – Current Functionality**		
WOM.IN.361	**Inventory**	***Withdrawal Activities***	Ability to complete tickets confirming inventory pulled	**1 – Current Functionality**		
WOM.IN.362	**Inventory**	***Withdrawal Activities***	Ability to track return authorization information including but not limited to:	**1 – Current Functionality**		
WOM.IN.363	**Inventory**	***Withdrawal Activities***	a) Return Authorization Number	**1 – Current Functionality**		
WOM.IN.364	**Inventory**	***Withdrawal Activities***	b) Contract Information	**1 – Current Functionality**		
WOM.IN.365	**Inventory**	***Withdrawal Activities***	c) Notes	**1 – Current Functionality**	Configurable Worktag	
WOM.IN.366	**Inventory**	***Withdrawal Activities***	d) Return Code	**1 – Current Functionality**		
WOM.IN.367	**Inventory**	***Withdrawal Activities***	e) Quantity	**1 – Current Functionality**		
WOM.IN.368	**Inventory**	***Withdrawal Activities***	f) Inventory Stock Code/Descriptions	**1 – Current Functionality**		
WOM.IN.369	**Inventory**	***Withdrawal Activities***	g) Return Date Parameters	**1 – Current Functionality**		
WOM.IN.370	**Inventory**	***Reporting***	System provides the ability to sort by user defined fields	**1 – Current Functionality**		
WOM.IN.371	**Inventory**	***Reporting***	Ability to extract inventory data and download into another electronic media like Excel or Access for further data manipulation and analysis	**1 – Current Functionality**		
WOM.IN.372	**Inventory**	***Reporting***	Ability to generate receiving exception reports including but not limited to:	**1 – Current Functionality**		
WOM.IN.373	**Inventory**	***Reporting***	a) Over / Under Receipts	**1 – Current Functionality**		
WOM.IN.374	**Inventory**	***Reporting***	b) Damage	**1 – Current Functionality**		
WOM.IN.375	**Inventory**	***Reporting***	c) Backorders	**1 – Current Functionality**		
WOM.IN.376	**Inventory**	***Reporting***	d) Does Not Meet Quality Requirements	**1 – Current Functionality**		
WOM.IN.377	**Inventory**	***Reporting***	Ability to run inventory control reports by but not limited to:	**1 – Current Functionality**		
WOM.IN.378	**Inventory**	***Reporting***	a) Company	**1 – Current Functionality**		
WOM.IN.379	**Inventory**	***Reporting***	b) Job	**1 – Current Functionality**		
WOM.IN.380	**Inventory**	***Reporting***	c) Department	**1 – Current Functionality**		
WOM.IN.381	**Inventory**	***Reporting***	d) Warehouse	**1 – Current Functionality**		
WOM.IN.382	**Inventory**	***Reporting***	e) User Defined	**1 – Current Functionality**		
WOM.IN.383	**Inventory**	***Reporting***	f)Inventory Stock Code/Descriptions	**1 – Current Functionality**		
WOM.IN.384	**Inventory**	***Reporting***	g) Transformer Costs	**1 – Current Functionality**		

WOM.IN.385	**Inventory**	***Reporting***	Ability to generate obsolete items report for specified criteria	**1 – Current Functionality**	
WOM.IN.386	**Inventory**	***Reporting***	Ability to generate inventory turns report by user defined criteria	**1 – Current Functionality**	
WOM.IN.387	**Inventory**	***Reporting***	Ability to generate a report of items not used for a user defined period of time	**1 – Current Functionality**	
WOM.IN.388	**Inventory**	***Reporting***	Ability to generate inventory control reports based on user defined criteria to take periodic cycle counts	**1 – Current Functionality**	
WOM.IN.389	**Inventory**	***Reporting***	Ability to generate spot audit reports to check levels in the system	**1 – Current Functionality**	
WOM.IN.390	**Inventory**	***Reporting***	Ability to generate a report showing authority levels by person	**1 – Current Functionality**	
WOM.IN.391	**Inventory**	***Reporting***	Ability to generate a report of out of stock items that have demand	**1 – Current Functionality**	
WOM.IN.392	**Inventory**	***Reporting***	Ability to generate a report that compares committed items to min. stock levels	**1 – Current Functionality**	
WOM.IN.393	**Inventory**	***Reporting***	Ability of system to report on inventory loss and gains for review	**1 – Current Functionality**	
WOM.IN.394	**Inventory**	***Reporting***	Ability of system to report by isle and/or bin.	**1 – Current Functionality**	
WOM.IN.395	**Inventory**	***Reporting***	Ability of system to have predefined custom reports	**1 – Current Functionality**	

IDAHO FALLS FUNCTIONAL REQUIREMENTS - WO / ASSET MANAGEMENT

VENDOR: Strada / Workday, Inc. / Sprypoint

Updated Vendor Response

Status	Req ID	Functional Group	Topic	Requirement	Vendor Response	Sprypoint Comments	ID Falls/ WCG Notes	Notes 3/20
CONFIRMED	WOM.AM.101	Asset Management	*Asset Additions and Maintenance*	System is able to copy an asset record to create a similar asset record.	4 – Modification Required	Minor enhancement.	Low priority. ID Falls accepts	
CONFIRMED	WOM.AM.115	Asset Management	*Asset Additions and Maintenance*	During mass additions process, user can split asset record entries for identical items and then assign separate asset numbers (e.g., purchase of 20 identical personal computers).	1 – Current Functionality	Minor enhancement.	Most applicable to Sanitation, buy containers in bulk and capitalized as a group, but tracked individually the department. Can their be an asset number for the group for capitalizing, and a separate tracking number for individual containers? Does it make sense to make Sprymobile the SoR over current Cayenta?	Property SOR - Workday Assets SOR - Workday Bulk vs individual capitalization is not a modification within Workday.
CONFIRMED	WOM.AM.133	Asset Management	*Asset Disposition, Retirement, and Th*	System allows for recording of the following information related to disposals, trade-ins, missing, lost, or stolen assets: l) Police Report	1 – Current Functionality	Available out of the box – attach report as PDF	Should this be changed to "in current functionality"?	Changed to in current functionality
CONFIRMED	WOM.AM.195	Asset Management	*Buildings*	w) Square footage for each occupant (e.g., by department)	4 – Modification Required	Clarification needed to understand use case. Potentially UDF field	ID Falls accepts.	
CONFIRMED	WOM.AM.38	Asset Management	*Asset Additions and Maintenance*	Ability to track minimally the following categories of assets: l) Funding Source	1 – Current Functionality	UDF	Are user defined fields reportable? Are UDF included in the base system? What modification is needed?	Changed to in current functionality
CONFIRMED	WOM.AM.54	Asset Management	*Asset Additions and Maintenance*	System must have ability to automatically and manually assign specific or multiple item/asset number(s).	1 – Current Functionality	Clarification needed – asset numbers are generally inherited from the system of record (GIS). For assets where SpryMobile is the SoR, asset numbers are usually copied from the input source and can be user modified with the appropriate permissions.	Need to review with Josh Pole or transformer has been created, does Sprypoint or Workday create an asset number? Josh believes what is in Sprypoint comment is sufficient.	Workday in current functionality, Sprypoint will not be SOR for assets.
CONFIRMED	WOM.AM.55	Asset Management	*Asset Additions and Maintenance*	Ability of system to provide a unique asset number to each item entered into system as an asset to be tracked.	1 – Current Functionality	Clarification needed – asset numbers are generally inherited from the system of record (GIS). For assets where SpryMobile is the SoR, asset numbers are usually copied from the input source and can be user modified with the appropriate permissions.	Is assigning an asset number base functionality? Does Workday or Sprypoint create asset numbers? GIS needs a two way sync. Need Josh for this discussion	Workday in current functionality, Sprypoint will not be SOR for assets.
CONFIRMED	WOM.IN.125	Inventory	*Inventory Master File*	Ability to have up to 20 user defined fields	4 – Modification Required	OK	ID Falls accepts.	
CONFIRMED	WOM.IN.158	Inventory	*Inventory Master File*	Ability to receive, issue and count items by bar code scanner or Radio Frequencies from multiple locations	1 – Current Functionality	Can be managed in Workday, but require an integration with a bar code vendor for scanning/potential enhnacement. Need to talk through specific ask.	ID falls would like to apply to inventory property	Workdday can pull in info from barcode scanner and at multiple locations. Changed to in current functionality
CONFIRMED	WOM.IN.242	Inventory	*Control Requirements (Inventory Cont*	Ability of system to enter, store and update inventory items in multiple warehouse locations including truck inventory. d) System will allow updated inventory totals to be enter either from a hand held device or workstation.	1 – Current Functionality	Can be managed in Workday, but require an integration with a bar code vendor for scanning/potential enhnacement. Need to talk through specific ask.	Include in overall barcode conversation with Vendors.	Changed to in current functionality
CONFIRMED	WOM.IN.267	Inventory	*Inventory Processing*	Ability to track and report offsite inventory	1 – Current Functionality	Workday	Validate with Workday and is it in base functionality	Changed to in current functionality
CONFIRMED	WOM.IN.280	Inventory	*Inventory Processing*	Ability to manage vendor held stock	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.301	Inventory	*Receiving Activities*	Ability to assign an internal status code to items before releasing into available inventory including but not limited to:	4 – Modification Required	Workday	Requirement not needed.	
CONFIRMED	WOM.IN.302	Inventory	*Receiving Activities*	a) In-house	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.303	Inventory	*Receiving Activities*	b) Failed	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.304	Inventory	*Receiving Activities*	c) Quality Issue	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.305	Inventory	*Receiving Activities*	d) Inspection Pending	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.306	Inventory	*Receiving Activities*	e) Verification Pending	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.307	Inventory	*Receiving Activities*	f) Pending Department Inspection.	4 – Modification Required	Workday	ID Falls to review with Josh to determine needs Req not needed.	
CONFIRMED	WOM.IN.308	Inventory	*Receiving Activities*	Ability to assign an internal location code to items before releasing into available inventory including but not limited to:	1 – Current Functionality	Workday		
CONFIRMED	WOM.IN.309	Inventory	*Receiving Activities*	a) Warehouse	1 – Current Functionality	Workday	ID Falls has multiple warehouses, validate with Workday and is it in base functionality	Changed to in current functionality
CONFIRMED	WOM.IN.310	Inventory	*Receiving Activities*	b) Depot	1 – Current Functionality	Workday	ID Falls has multiple warehouses, validate with Workday and is it in base functionality	Changed to in current functionality
CONFIRMED	WOM.IN.322	Inventory	*Receiving Activities*	Ability to scan images of the following including but not limited to:	4 – Modification Required	Workday		
CONFIRMED	WOM.IN.323	Inventory	*Receiving Activities*	a) Packing Slips	1 – Current Functionality	Workday	Validate with Workday how this could be handled b) for this requirement is "invoices" and is set as "in current functionality"	Items can either be scanned into system or documents can be integrated through Vendor portal as an example.
CONFIRMED	WOM.IN.325	Inventory	*Receiving Activities*	c) Material Safety Data Sheet (MSDS)	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Items can either be scanned into system or documents can be integrated through Vendor portal as an example.
CONFIRMED	WOM.IN.326	Inventory	*Receiving Activities*	d) Miscellaneous Documentation	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Items can either be scanned into system or documents can be integrated through Vendor portal as an example.
CONFIRMED	WOM.IN.327	Inventory	*Receiving Activities*	Ability to update quantity on-hand real-time	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Change to in current functionality Modification req to see real time inventory quanties in Sprymobile
CONFIRMED	WOM.IN.328	Inventory	*Receiving Activities*	Ability to automatically notify departments of availability	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Possible through an integration and not via a scanner. Bar code integrations, barcode inc or Nice label.
CONFIRMED	WOM.IN.335	Inventory	*Receiving Activities*	Ability to print bar codes for any non-bar coded items	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Possible through an integration and not via a scanner. Bar code integrations, barcode inc or Nice label.
CONFIRMED	WOM.IN.336	Inventory	*Receiving Activities*	Ability to receive items by bar code scanner from multiple locations	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Possible through an integration and not via a scanner. Bar code integrations, barcode inc or Nice label.
CONFIRMED	WOM.IN.337	Inventory	*Receiving Activities*	Ability to drill down on an item to the scanned copy of receiving report or packing slip	1 – Current Functionality	Workday	Validate with Workday how this could be handled	Possible through an integration and not via a scanner. Bar code integrations, barcode inc or Nice label.
CONFIRMED	WOM.IN.64	Inventory	*Inventory Management*	Ability to create bar code labels and utilize bar code readers in receipt of goods, issuances, transfers, and inventory cycle counts	4 – Modification Required	Can be managed in Workday, but require an integration with a bar code vendor for scanning/potential enhnacement. Need to talk through specific ask.	This is a duplicate	
CONFIRMED	WOM.MWM.14	Mobile Work Managemen	*Mobile Work Management*	System has the ability to accept credit card information and pass to CIS through mobile device	4 – Modification Required	Clarification needed - why is credit card information passing through WAMS? Perhaps as a CIS/WO function	Requirement not needed.	
CONFIRMED	WOM.MWM.4	Mobile Work Managemen	*Mobile Work Management*	System has the ability to view real time inventory item catalog, quantity on hand, status of materials on order, and purchase history through mobile device	2 – Scheduled Release	OK	Review with Josh. This would be a nice improvement, need to review with Vendors.	Not needed within Sprymobile. Workday can handle with current functionality on mobile on a web browser. Mobile app is a future release. Changed to "scheduled Release" Stephanie to follow up with more details
CONFIRMED	WOM.PM.27	Preventative Maintenanc	*Preventative Maintenance*	System has the ability to forecast future PM requirements	1 – Current Functionality	Enhancement - Custom Report Development would be required. Clarification needed as to extent of the forecast.	Need a PM system, discuss with vendors	Changed to in current functionality
CONFIRMED	WOM.PM.40	Preventative Maintenanc	*Preventative Maintenance*	Does your product generate the required quarterly NERC exceptions reports	4 – Modification Required	Clarification needed to talk through requirements. An enhancement is required for this functionality.	Requirement not needed.	
CONFIRMED	WOM.PM.79	Preventative Maintenanc	*Preventative Maintenance*	System has the ability to tie inventory requirements to the work order based on a combination of repair task(s), equipment model, and equipment year	1 – Current Functionality	Base functionality exsists, need clarification to understand specifics as an enhancement may be required for the is functionality.	Review with Josh. Per Josh, expectation is this is a base preventive maintenance system functioinality.	Predefined pick lists are possible based on WO type. Change to in current functionality
CONFIRMED	WOM.PM.80	Preventative Maintenanc	*Preventative Maintenance*	System has the ability to generate a purchase requisition for a kit of components needed for an unscheduled repair	4 – Modification Required	OK	Can ssystem use rules to group items as a "kit" to be ordered together?	Req not needed.
CONFIRMED	WOM.WO.59	Work Management	*Work Management*	System has the ability to identify a work order as billable with automatic forwarding to the appropriate department for invoice creation	1 – Current Functionality	OK	Will this be handled in Workday as a tag?	Accomplished via spend tag for internal department billing. City would like to automate process to create customer invoice. Start with invoice, not WO. Changed to in current functionality.
CONFIRMED	WOM.WO.65	Work Management	*Work Management*	System has the ability to drill down to and view all contacts attached to a work order	1 – Current Functionality	OK	Can this be a function in the general notes tab?	Req modified: System has the ability to drill down to and view all contacts attached to a customer record vs the WO. WO attached in reference. Site contact is a UDF in Sprymobile.

Exhibit B – SaaS Pricing Schedule

1. Client Information

This Pricing Schedule is entered into by SpryPoint Services, Inc. ("SpryPoint") and Client as of the Effective Date and is subject to the terms and conditions of the Master Subscription Agreement between the Parties.

Name ("Client")	City of Idaho Falls
Client Billing Contact Name	Mark Hagedorn
Client Billing Contact Phone Number	208-612-8232
Client Billing Contact Email	MHagedorn@idahofalls.gov
Client Billing Address	308 Constitution Way Idaho Falls, ID 83405

2. Initial Term

The initial term of the subscriptions for SpryPoint SaaS reflected herein will commence on the Effective Date for a period of one (1) year and Client's subscription will automatically renew annually on the anniversary of the Effective Date for seven (7) successive one (1) year renewal terms.

3. Invoicing

Subscription Fees are in United States Dollars. The Subscription Fee for the initial year will be invoiced upon contract execution. Thereafter, Client's annual Subscription Fee will be invoiced annually 30 days in advance of the anniversary of the Effective Date for the duration of Client's subscription.

Implementation and Professional Services fees will be invoiced per the applicable SOW, change order, or as otherwise mutually agreed and are not reflected herein. All other fees will be billed subject to the Usage Metric Verification Process or the Integrated Notification Services Fees, described in the Agreement.

4. Payment Terms

Net 30 days from date of invoice.

SMART SOLUTIONS FOR SMART UTILITIES

5. SpryPoint SaaS Subscriptions

SpryPoint SaaS Subscription Name	SpryPoint SaaS Description	Environments Included during "implementation" *	Environments Included after "go-live" *	SpryPoint SaaS Usage Metric	Usage Metric Quantity	SpryPoint SaaS Fee Per Usage Metric	Initial Annual Subscription Fee
SpryMobile – Work Order Asset Management	SpryMobile Work Order Asset Management supports asset management with media and document management; broadcast and direct messaging; activity logs; reporting; asset specific configuration; maintenance management; mapping	Production (1) Staging (1)	Production (1) Staging (1)	Full Users[2]	120	$900.00	$108,000
Total Subscription Fee							**$108,000.00**

[1] "**Active Accounts**" means the maximum annual quantity, in blocks of 500, licensed and available to Client in the production environment over a 12-month period. An account is no longer considered Active when the "Account State" field is automatically moved to Inactive by the System as determined by Client configuration decisions. In most cases the Account State is considered inactive when the Account is ineligible to receive a new Billing Statement and is no longer subject to ancillary processes such as penalties, collections routines, or external communication from SpryCIS.

[2] "**Full User**" means a user who can access SpryMobile's full functionality to create, edit and share data.

[3] "**Light User**" means a user who has read-only to access to SpryMobile functionality.

[4] "**Testable Assembly**" means an assembly subject to test notices and test entry submissions.

* Upon mutual agreement between SpryPoint and Client, other environments may be established for specific purposes throughout the implementation (e.g., Test & Train) and will not result in additional cost to Client. If additional dedicated environments are required post go-live there may be additional fees required.

Integrated Notification Services Fees invoiced quarterly for actual usage or as otherwise described below exclusive of any applicable communications service or telecommunication provider (e.g., carrier fees or surcharges)	
Inbound & Outbound SMS Messaging	$0.02 / Message segment consisting of a maximum of 160 characters. A message containing more than 160 characters, will be billed per 160 character message segment.
Local Outbound Voice Messaging	$0.03 per minute
Toll-Free Outbound Voice Messaging	$0.03 per minute
Optional Random Short Code	$15,000.00 per year

SpryPoint Services, Inc.

Exhibit C – Service Level Agreement

1. Introduction and Overview

SpryPoint's applications are delivered as a service in the cloud. Integrating software development and support is the optimal way to serve customers. SpryPoint's Customer Success Team works with the product engineers that build, implement, test, and maintain our applications.

This Service Agreement defines the general technology as well as the scope of the Ongoing Production Support Services for SpryPoint's software-as-a-service. At a high level, this includes:

- Application support and maintenance
- Management of updates and enhancements
- Technology infrastructure management
- Backup and recovery
- High availability, disaster recovery, and business continuity
- Database management
- Network configuration and monitoring
- Security
- Operations and service delivery management
- Help desk/support
- Reporting/Performance measurement tools

These Services may be supplemented by change requests agreed upon by the parties in writing.

This Agreement describes the responsibilities of all parties, the scope, and approach to the delivery of the services specified herein ("the Services").

The transition to the Customer Success team will occur when:

- All severity 1 and 2 issues have been resolved

- All severity 3 issues have a defined plan for resolution
- The Post Go Live Support as defined in the Statement of Work is complete
- A finalized punch-list of any outstanding items has been created and responsibilities assigned

The transition involves:

- Formal knowledge transfer between SpryPoint's Service Delivery and Customer Success Teams
- An introductory meeting with the client, SpryPoint's Project Manager and SpryPoint's Customer Success Team.

This Agreement is specific to SpryPoint's software-as-a-service applications operating in a production environment as described in the current Pricing Schedule incorporated as part of this Agreement. Any non-production or test environments are expressly excluded from this or any other Service Agreement.

2. Definitions

These terms shall have the following meanings whenever used in this Agreement.

"Assist" means the party which may provide input into a task and/or be consulted before a decision or action is performed.
"Business Hours" means 8:00 a.m. – 4:00 p.m. Eastern Time, Monday – Friday (excluding holidays).
"Demarcation Point" means the outermost point of connectivity to the Service(s) public or private endpoints such as the data centers, infrastructure, and applications provided by SpryPoint.
"Environment" provides resources and services over the Internet and access through a web browser or client software.

- Production Environment – is where the latest version of the SpryPoint application is deployed and available to the intended users.
- Staging Environment – an environment, used for testing, that mirrors the production environment as closely as possible.

"Impact" means the influence of an event on the organization or organization's customers.
"Issue" is a disruption to everyday operations that may or may not have significant consequences.

"Lead" means the party with final decision-making authority, accountability, and responsibility for task completion; this party needs to make sure the work gets done.
"Outage" means the total minutes the service is unavailable outside the scheduled maintenance window.
"Response Time" means the number of Support Hours in which a member of the SpryPoint team will respond to a new issue.
"Resolution Target" means the number of Business Hours in which an issue should be resolved following the identification of its root cause.
"Scheduled Maintenance" means the total minutes of planned maintenance activities per month. Currently, scheduled maintenance is 4 hours for weekly maintenance and 4 hours for monthly maintenance. Maintenance windows are defined further in System Maintenance and are subject to change on 30 days' notice from SpryPoint.
"Severity" is used to understand the impact of an issue quickly and set priorities for resolution target and is measured by how severely the issue is affecting functionality.
"Support Hours" means 7:00 a.m. – 8:00 p.m. Eastern Time, Monday – Friday (excluding holidays).
"Support Request" means a request to support the resolution of an issue when further assistance is needed from technical experts.
"Tiers" represents the complexity of the issue reported.
"Total" means the total minutes the service is available less those exceptions listed under Service Availability.
"Update Frequency" means the number of Support Hours in which the SpryPoint team will provide an update to an unresolved issue.

3. Scope of Service/Responsibilities

3.1. Ongoing Support and Subscription Services

3.1.1. Application Support

The table below describes the application support functions provided in the service and the responsibility assignment of each item.

Item	Responsibility	
	SpryPoint	Client
Provide Tier 1 help desk and application support such as, user password management	Assist	Lead

Item	Responsibility	
	SpryPoint	Client
Attempt to resolve Tier 1 issues using existing knowledge base	Assist	Lead
Maintain and update SpryPoint's knowledge base and other documentation	Lead	N/A
Service Request Management		
Provide technical and functional troubleshooting for Tier 2 issues	Lead	Assist
Work with Client to determine if an issue is for new system functionality (change) or requires assistance (bug)	Lead	Assist
Provide a web-based system for issue tracking	Lead	N/A
Work with Client to assign proper severity of issue based on definitions	Lead	Assist
Provide issue tracking and reporting	Lead	N/A
Work with client to resolve Tier 2 and Tier 3 issues	Lead	Assist
Monitor, measure, and report on the status of Tier 2 and Tier 3 issues	Lead	Assist
Resolve Tier 2 and Tier 3 issues	Lead	Assist
Provide analysis of recurring issues and establish a resolution or work around for such issues.	Lead	Assist
Work with Client in reporting and resolving unplanned outages of any component or environment.	Lead	Assist
Provide root cause feedback for all Severity Level 1 issues	Lead	Assist
Escalate issues as needed	Lead	Assist
Promptly report outages and service interruptions	Lead	Assist
Application Support		
Provide application support to the functional process owners	Lead	Assist
Address functional issues and questions involving "how to" raised by end-users	Assist	Lead
Work with departments to leverage software to streamline business processes	Assist	Lead
Assist with system functionality and process flow questions for software and reports	Assist	Lead
Provide functional support for first time processing of critical client business processes	Lead	Assist
Focused functional process support (i.e., end of year processing)	Assist	Lead
Maintain application releases of the current software in the production environment	Lead	N/A
Assist in reporting product issues to software vendor support and obtaining resolution	Assist	Lead
Provide availability management and support	Lead	N/A
Provide maintenance and support for all integrations	Lead	Assist
Provide maintenance and support for all reports	Lead	Assist
Provide maintenance and support for all scheduled jobs	Lead	Assist
Provide functional testing support	Assist	Lead
Deploy required application software	Lead	N/A
Provide post-deployment verification testing of required software	Lead	Assist
Security Administration		
Provide application security maintenance and administration	Lead	N/A
Conduct user access management and review	Assist	Lead

Item	Responsibility	
	SpryPoint	Client
Maintain and support firewall subsystem software components where applicable (e.g., patches and software upgrades) on Client hardware and software	N/A	Lead
Monitor virus/security alerts and vulnerabilities from manufacturers and determine appropriate action per procedure	Lead	Assist

3.1.2. Operational Support

The table below describes the operational support functions provided in the service and the responsibility assignment of each item.

Item	Responsibility	
	SpryPoint	Client
Hosting Services		
Provide hosting services	Lead	N/A
Provide for a replicated system architecture	Lead	N/A
Provide disaster recovery services including system and data restoration	Lead	N/A
Conduct periodic testing of the disaster recovery solution	Lead	N/A
High availability and continuity of the service including load balancing to redirect traffic, multi-zone databases, auto-scaling instances based on application and processing load	Lead	N/A
Provide for secure transmission of data being stored and/or archived	Lead	N/A
Provide toll-free support line	Lead	N/A
Provide hosting services	Lead	N/A
Database Management		
Perform database administration	Lead	N/A
Perform database monitoring	Lead	N/A
Perform database tuning	Lead	N/A
Perform database security	Lead	N/A
Perform database procedures	Lead	N/A
Perform scheduled maintenance procedures	Lead	N/A
Perform database patching and updates/service packs	Lead	N/A
Communicate patch and update impact analysis	Lead	N/A
Perform database capacity planning	Lead	N/A
Perform database refresh/clones	Lead	N/A
Perform database backup and recovery	Lead	N/A
Perform any data purging or archiving as required	Lead	N/A
Release Management		
Assess impacts of new releases to the environment	Lead	Assist
Perform Client-requested periodic refreshes of the non-production environments from the production environment up to twice per calendar month	Lead	Assist
Perform application upgrades	Lead	Assist
Perform maintenance pack installations	Lead	Assist
Perform emergency release updates as needed.	Lead	Assist

Item	Responsibility	
	SpryPoint	Client
Access Management		
Manage administrative user access to the environments	Assist	Lead
Manage user access at the operating level	Assist	Lead
Manage application users and their access to the various environments	Assist	Lead
Performance Management		
Monitor system performance	Lead	N/A
Monitor application performance	Lead	N/A
Monitor scheduled job performance	Lead	Assist
Analyze performance related issues to identify factors impacting performance	Lead	Assist

3.1.3. Technology Infrastructure Services

The table below describes the technology infrastructure functions provided in the services and the responsibility assignment of each item.

Item	Responsibility	
	SpryPoint	Client
Review and resolve technical issues with the system	Lead	Assist
Assist with system debugging and issue resolution	Lead	Assist
Resolve system technical issues with scheduled jobs and reports	Lead	Assist
Answer technical questions for day-to-day maintenance	Lead	Assist
Perform system administration	Lead	Assist
Provide system monitoring and tuning	Lead	Assist
Provide system capacity planning	Lead	Assist
Provide storage capacity planning	Lead	Assist
Provide workload management and support	Lead	Assist
Perform infrastructure maintenance and support	Lead	Assist
Manage the testing of all application and system changes prior to applying to production	Lead	Assist
Perform updates/service packs on application infrastructure	Lead	N/A
Perform system patching and updates/service packs (desktop)	N/A	Lead
Provide change bundling analysis to reduce the frequency and length of time required to apply changes	Lead	N/A
Provide a back-out plan for changes to the various environments	Lead	N/A
Apply code patches for application software	Lead	N/A
Implement minor technology updates	Lead	N/A
Provide system maintenance scheduling and coordination	Lead	N/A
Report system outages and service interruptions	Lead	Assist
Provide infrastructure monitoring and alerting	Lead	N/A
Provide set-up, maintenance, and support for the following environments:		
Production	Lead	N/A
Staging	Lead	N/A
Sandbox (where applicable)	Lead	N/A

3.2. Billable Services

There will be instances where a client request is beyond the scope of the original contract. Any out-of-scope item is considered an enhancement or a change to the service and should be directed to our Customer Success team through regular support request options. Enhancement requests would include new functionality and features. Change requests would include changes to the services or responsibilities of the service.

Examples of billable services that require a quote:

- Requests for new reports
- Requests for changes to current reports
- New configuration/setup
- Rate changes
- Changes to bill print/template
- Changes to forms or letters

3.3. Quote Process

The client may request additional services or modifications to the application at any time. All Changes will be documented and approved, regardless of whether there is an associated cost for the change.

Requests for changes should be made to SpryPoint's Customer Success Team. They will review the request and create a quote to include the following:

- A description of the problem that needs to be solved or the issue to be addressed.
- A description of the solution to the problem or issue to be addressed, including the use/business case and/or reason for the Change and suggested solution.
- An estimated delivery time
- If applicable, any fees/cost and expenses associated the Change.

The Change process is defined below. The Change must be approved by both SpryPoint and the Client before any work related to a Change is completed.

- Identify the requested Change
- Identify and document the solution and scope of work associated with the Change requested

- Estimate required effort, and any associated costs
- Submit for review and approval by the Client and SpryPoint Management Team
- If not approved, no changes are completed, and the Change request is canceled
- If approved, SpryPoint will work with the client to schedule.
- Monitor and report progress on the Change
- Communicate the Change resolution

3.4. Rate Card

Any billable services to the Service beyond go-live will be performed at the then prevailing rate as published by SpryPoint on an annual basis. Any enhancements will be implemented pursuant to the change control process as outlined in the Statement of Work.

4. Performance Measurement

4.1. Support Level Definitions and Responsible Parties

Client agrees to follow escalation procedures and is responsible for Tier 1 support functions before new application or functionality related to SpryPoint services is enabled in production.

4.1.1. Client Responsibilities

Tier	Definition	Description/Examples
1	Support performed by Client, who shall be responsible for addressing common user questions and issues	• Provide application navigation tips • Perform password resets or analyze login issues • Answer questions regarding basic operation of the application • Gather information to escalate to Tier 2 support

(Continued on next page)

4.1.2. SpryPoint Responsibilities

Tier	Definition	Description/Examples
1	Support performed by Client, who shall be responsible for addressing common user questions and issues	Maintain documentation to enable Client to resolve most Tier 1 support issues without requiring escalation to specialized application support.
2	In-depth technical support performed by SpryPoint to address issues outside the scope of Tier 1 issues. SpryPoint's experienced team are available to: • Assess issues • Provide solutions • Resolve issues • Create new features	Provide Tier 2 support for all SpryPoint applications which includes: • Advanced technical and system administration responsibilities which may require application log, database access, or other code-related troubleshooting • Clearly defined points-of-contact, available to receive and appropriately respond to issues from Tier 1 support • Advice and assistance for the applications and non-programming activities in direct support of users • Advise Client personnel of estimated time to resolve an issue after root cause diagnosis • Provide status updates during issue resolution • Escalate Tier 2 support issues to Tier 3 support at our sole discretion
3	A level of product and service support provided by SpryPoint resources (such as product managers or product team)	Provide Tier 3 support for all SpryPoint applications which includes: • Data fixes • Code-related troubleshooting • Bug fixes

4.2. Issue Reporting

The Client shall designate one or more power users to request and receive support services from SpryPoint. These users must be trained on the SpryPoint applications for which they initiate support requests.

To report an issue, submit a support request by:

- Support widget (must be enabled in-app)
- SpryPoint Helpdesk Portal - support.sprypoint.com
- E-mail – support@sprypoint.com
- Phone - 855.TRY.SPRY

Issue reporting shall be available twenty-four (24) hours a day, seven (7) days a week, and 365 days a year.

Before reporting an issue, Client's personnel must collect as much of the following information as possible:

Criteria	Description/Examples
Date and Time	When did the issue start
Product/Function	SpryCIS – Meter Reading
General Description	Describe the issue you are experiencing as well as the expected results
Replication	How to replicate the issue
Severity	Per the severity levels defined in this document
Operating System	iOS, Android, Windows, MacOS
Device	iPad, Chromebook, Microsoft Surface, MacBook
Browser	Chrome, Safari, Edge, Firefox
Screenshots	Screenshots of the error will help with troubleshooting

Support requests are submitted to report issues. SpryPoint's Customer Success Team will address tickets according to the Severity Level. The SpryPoint team will determine the cause of the issue and begin the process for correction and/or remediation. Some possible causes of an issue to be reported are:

Bug – an error, flaw, or fault in the application that causes an incorrect or unexpected result or behavior.

Configuration Request – a change or update to the behavior of an application through a setting in the user interface.

New Feature Request – an update to the application to provide new functionality or a new feature.

Training Issue/Question – Client does not understand how or why something is behaving the way it is or needs to understand options to change the base behavior.

Performance/Service Issue – generally a high priority, high severity item that includes outages, downtime, and other issues affecting the usability of SpryPoint applications.

4.3. Issue Prioritization, Definitions, Responsible Parties, and Targets

Severity Level	Example	Response Target	Resolution Target	Update Frequency
1 Urgent	Client's business is not operational due to significant performance issues or outage, creating a substantial impact	1 hour	4 hours	1 hour

Severity Level	Example	Response Target	Resolution Target	Update Frequency
	financially or by the number of customers affected. Critical business function(s) cannot be performed and/or a key component is unavailable or is non-functional. There is no immediate work around. Urgent issues have top priority until resolved Examples of Severity 1 issues include: • System is unavailable (outage) • Unable to perform a key function such as calculation of bills or billing process • A key function is malfunctioning, creating a severe financial/customer impact • Any event that impacts more than 20% of the customer base • Severity Level 1 issues are subject to an Issue Post-mortem by SpryPoint			
2 Critical	Client's business is operational but the ability to perform business functions is severely impacted, A critical business function or functions are partially operational or operating by use of a workaround only sustainable for a short period of time. A critical business function or functions is operating at limited capacity or has a defect which creates errors or atypical results to customer records, transactions, or financials. Examples of Severity 2 issues include: • 10%-20% of the customer base are affected by bills which are calculating or rendering incorrectly • Response times on transactions or screens are 3 times the normal response times (response times must be tracked at go-live for benchmark) • Processes take 3 times as long to complete or error out (response times must be tracked at go-live for benchmark)	2 hours	16 hours	4 hours

Severity Level	Example	Response Target	Resolution Target	Update Frequency
3 Restricted Use	The service is experiencing an issue that can be worked around but is impacting client's efficient use of the service. The business is operational but with reduced efficiency. Examples of Severity 3 issues include: • Single account issue • Business function has a slight restriction of function of non-critical nature • A work around is required to maintain normal operations • Non-performance impacting defect	4 hours	160 hours	40 hours
4 Not Urgent	The service is fully functional but may contain a cosmetic flaw, or misspelling. There is no operational, financial, or customer impact. Examples of Severity 4 issues include: • A button is out of alignment on the user interface • Question regarding configuration or functionality • General inquiries	8 hours	200 hours	Upon resolution
5	Enhancement request	16 hours	As defined in "Quote Process" section 3.3	As defined in "Quote Process" section 3.3

4.4. Triage

Based on the severity level of the support request, Client can expect a response from the SpryPoint Customer Success Team as indicated in the table above.

During this initial contact, the team has several objectives:

1. Confirm and/or clarify our understanding of the support request. Adjust reported severity level if necessary.
2. Document the use case where the issue occurs.
3. Establish a resolution plan and provide an estimated resolution time if possible.
4. If an estimated resolution time cannot be provided during the initial contact, Client will be provided with an estimate on the timeframe.

5. If the support request is Level 5 (enhancement request), Client will be contacted to discuss the use case and scope of the enhancement. An enhancement specification and quotation will be delivered.

4.5. Resolution

Issue Resolution indicates that the issue has been addressed and resolved, pending confirmation from Client's power user. If for any reason Client is not satisfied with the resolution, Client may request the issue to be re-opened.

4.6. Service Maintenance

The primary contact for the ongoing maintenance and support of the application is SpryPoint's Customer Success team. Although rare, SpryPoint may, at its discretion, schedule a system maintenance window, during which time normal production services may not be available. Planned system maintenance windows are mutually agreed upon with the Client. Whenever possible, SpryPoint will plan Scheduled Maintenance to coincide with Client's IT system maintenance windows and outside the hours of 7:00 a.m. and 5:00 p.m. Eastern Standard Time.

There may be some instances where updates are required immediately or within a short timeframe to maintain the integrity or functionality of SpryPoint applications. In such cases, SpryPoint will notify Client's designated contact of unplanned system maintenance and work with Client to deploy the necessary changes during the earliest, mutually favorable time. SpryPoint will promptly notify Client's designated contact of any downtime and provide confirmation once full functionality is restored.

In extraordinary circumstances, it may be necessary to take the system offline or otherwise prevent access to applications. This would be the result of an exceptional situation (i.e., a zero-day vulnerability) where SpryPoint would take preventive action to mitigate any potential adverse impact to our clients

4.7. Device and Operating System Support

- SpryPoint shall use commercially reasonable efforts to identify a root cause and provide technical solutions therein for any reported bugs, defects, issues, etc., provided that the Software or Services are not otherwise impaired at the start of the then-current Service Term and has been properly maintained by Client in accordance with SpryPoint's policies. SpryPoint is not required to support its applications in the following circumstances: hardware that is no longer supported by its manufacturer. (e.g., iPhone 3G, Samsung Galaxy S Captivate)
- Operating systems or versions of operating systems which are no longer supported or updated by their authors (e.g., Apple, Google, Microsoft, etc.).

- Errors that are a result of product misuse, negligence, or improper utilization of any or all part of the Software or Services.
- Issues that are a result of electrical failure, internet connections problems, and all data issues deemed to be under Client's exclusive control and responsibility including but not limited to: data input and output are outside the scope of this service level agreement.

Maintenance for unsupported operating systems and/or hardware may be available to clients at an additional charge.

4.8. Issue port-mortem process

The issue post-mortem process at SpryPoint includes the following:

Action	Objective
Summary of what happened	• Which services and customers were affected? • How long and severe was the issue? • Who was involved in the response? • How was the issue resolved?
Root cause analysis	• What were the origins of failure? • Why do we think this happened?
Steps taken to diagnose, assess, and resolve	• What actions were taken? • Which were effective? • Which were detrimental?
Timeline of significant activity	Centralize key activities from monitoring tools, ticket management, issue details as well as internal and external communications.
Learning and next steps	• What went well? • What did not go well? • How do we prevent this issue from happening again?
Summarize findings	Circulate summary to affected clients upon request.

4.9. Support Hours

After-hours, on-call support is available when requested. This provides extra support when migrating, updating, or upgrading integrated line of business applications. After-hours, on-call support rates will be in accordance with the current Rate Card (Section 3.3).

4.10. Holidays

Response to requests other than Severity Level 1 may be delayed up to 24 hours during mutual holidays observed by SpryPoint and Client as outlined below:

Holiday	Date (on or around)
New Year's Day*	January 1
Labour Day	First Monday in September
Christmas Day*	December 25

*If holiday falls on a weekend, it will be observed the following Monday.

5. Service Level Agreements

Service Level Agreements (SLAs) provide clarity around the commitments to deliver the Service and set expectations for both parties relative to the Client's business and the impact/role of the Service within the Client's business.

5.1. Exclusions, Exceptions and Limitations

This does not apply to any Service performance issues caused by factors; (i) outside of SpryPoint's reasonable control, including any force majeure event or Internet access or related issues beyond the demarcation point of SpryPoint; (ii) that result from Client's equipment software or other technology such as metering technology, payment and data processing services, networking technology and/or third-party equipment, software, integration services or other technology (other than third party equipment within our direct control); (iii) that result from any scheduled maintenance as provided for pursuant to this Agreement; or (iv) arising from SpryPoint's suspension and termination of Customer's right to use Software.

5.2. Service Availability

SpryPoint will use commercially reasonable efforts to make our Services available with an uptime percentage of at least 99.5% within a given calendar month.

5.3. Service Credits

In the event of a failure by SpryPoint to meet the Service Availability and Issue Resolution Targets as defined in this SLA, as the Client's sole and exclusive remedy, at Client's request, SpryPoint will provide Service Credits in accordance with the following:

1. First month of missed service availability or issue resolution target, SpryPoint and Client will meet to discuss possible corrective actions
2. Second consecutive month: 10% of the Subscription Fee paid for the applicable month of the affected SpryPoint application

3. Third consecutive month: 20% of the Subscription Fee paid for the applicable month of the affected SpryPoint application
4. Fourth consecutive month: 30% of the Subscription Fee paid for the applicable month of the affected SpryPoint application
5. Fifth consecutive month: 40% of the Subscription Fee paid for the applicable month of the affected SpryPoint application
6. Sixth consecutive month: 50% of the Subscription Fee paid for the applicable month of the affected SpryPoint application
7. More than six consecutive months: Within thirty (30) days of such failure Client shall have the option to terminate the entire Agreement and upon termination Client shall receive a refund of all prepaid subscription fees that are unearned as of the date such termination becomes effective
8. Service Credits shall be deducted from subsequent invoices for Subscription Fees, or upon the termination or expiration of the Agreement the Service Credits would be paid directly to the Client

6. Periodic Service Reviews

6.1. Periodic Review of Open Tickets and Outstanding Issues

Such reviews are offered by SpryPoint upon client request and may be held either monthly or quarterly as agreed by both parties. Reviews are led by a member of the SpryPoint Customer Success Team and commonly include:

- Discussion and review of open or recently closed tickets
- Discussion and review of recent or forthcoming product releases

6.2. Periodic Review of Service Level Agreement Performance

Such reviews will be held annually (or on a periodic basis as agreed by both parties). Either party may request the review. The review will be led by the Manager of Customer Success and shall include:

- Discussion and resolution of any issues that may arise under an SLA
- Service delivery since last review
- Major deviations from service targets
- Negotiate proposed changes to the SLA
- Resolve concerns about service delivery
- Discuss any staffing changes for SpryPoint or Client

The review mechanism shall include an escalation procedure under which any unresolved issues are escalated for immediate resolution. Disagreements shall initially be handled by means of the following escalation provision.

6.3. Escalation

In the unlikely event that a customer needs to escalate an issue beyond the Customer Success Analyst in charge, the following is the path of that escalation:

CEO

|

Chief Customer Officer

|

Customer Success Manager

|

Senior Success Analyst

|

Success Analyst

If the Client is unable to get appropriate support from the assigned support analyst or senior support analyst, the client may escalate first to Shelley MacLeod, Manager of Customer Success and then to Chris Scalia, Chief Customer Officer.

Contact information for the Customer Success Management Team:

Shelley MacLeod
Customer Success Manager
Successsmacleod@sprypoint.com
Office: 902.510.1770
Mobile: 902.213.0950

Chris Scalia, CCO
Chief Customer Officer
cscalia@sprypoint.com
Office: (877) 879-7779 ext. 897

Mobile: (617) 290-7170

7. Release Management

We provide application releases on a two-week interval.

The Customer Success Team works with the Product Management team to create and distribute Release Notes to our clients. Our releases typically include new features and functionality as well as bug fixes.

Product Releases:

- Release Notes are sent to the primary contacts in the organization. However, anyone can be added to the distribution list.
- Release Notes will be provided before deployment to your production environment.
- Releases are deployed after standard business hours and live in the system the next business day.
- New features and functions are disabled by default when deployed.
- Customer Success is available to assist your team in determining if enabling a new feature is right for your organization.

Exhibit D – Insurance Coverage

SpryPoint will maintain during the entire Term of this Agreement, at its own expense, the insurance coverage below which meets or exceeds the coverages and limits as specified in the Client's requirements. Insurance coverage for this agreement will be at a minimum as follows:

1. **COMMERCIAL GENERAL LIABILITY INSURANCE**
   SpryPoint shall maintain Commercial General Liability Insurance as follows:

   a. $3,000,000 Each Occurrence
   b. $6,000,000 General Aggregate
   c. $3,000,000 Personal and Advertising Injury
   d. $2,000,000 Products/Completed Operations Aggregate
   e. $2,000,000 Non-Owned Automobile

2. **COMMERCIAL AUTOMOBILE LIABILITY INSURANCE**
   SpryPoint shall maintain Commercial Automobile Liability Insurance (if applicable) as follows:

   a. $2,000,000 Each Occurrence
   b. $2,000,000 Annual Aggregate

3. **ERRORS AND OMISSIONS AND CYBER INSURANCE**
   SpryPoint shall maintain Errors and Omissions and Cyber Insurance as follows:

   a. $3,000,000 Per Claim

4. **WORKERS' COMPENSATION**
   SpryPoint shall maintain Workers Compensation Insurance through the Workers Compensation Board of Prince Edward Island (WCBPEI). The Workers Compensation Board (WCBPEI) is a Provincial Government Organization that is responsible for all Workers Compensation related incidents for employees of companies based on Prince Edward Island. As an employer based in Prince Edward Island, SpryPoint is legally required to maintain Workers Compensation insurance through WCBPEI. If there is a workplace incident related to SpryPoint employees, coverage is provided by the WCBPEI regardless of the location. Upon written request, SpryPoint will provide Client with a copy of the Workers Compensation Clearance letter issued by WCBPEI which confirms SpryPoint's coverage and that our account is in good standing.

   For SpryPoint's US employees, the Company will carry Workers' Compensation Insurance and Employers' Liability Insurance in the minimum amount of One Million Dollars (US $1,000,000) each employee by accident, One Million Dollars (US $1,000,000) each employee by disease,

and One Million Dollars (US $1,000,000) aggregate by disease with benefits afforded under the laws of the state or country in which the services are to be performed.

5. ADDITIONAL INSURANCE RELATED PROVISIONS

a. SUBCONTRACTORS.

SpryPoint agrees to ensure that subcontractors, and any other party involved with the Services who is brought onto or involved in the performance of the Services by SpryPoint, provide the same minimum insurance coverage required of SpryPoint, except as with respect to limits. SpryPoint agrees to monitor and review all such coverage and assumes all responsibility for ensuring that such coverage is provided in conformity with the requirements of this Agreement.

b. EVIDENCE OF COVERAGE.

Prior to the commencement of any Services under this Agreement, SpryPoint shall, at its sole cost and expense, provide and maintain not less than the minimum insurance coverage as indicated in this Agreement. Such insurance coverage shall be maintained with insurers and under forms of policies as described in this Agreement. Upon written request, SpryPoint will provide Client all certificates, as applicable, related to the insurance coverage described herein.

SpryPoint Services, Inc.

Exhibit E – Data Processing Exhibit

This Data Processing Exhibit ("DPE") forms a part of and is subject to the SpryPoint Master Subscription Agreement ("Agreement"), applicable Pricing Schedule or Statement of Work or other written subscription agreement (together with any attachments issued thereunder, the "Agreement") between SpryPoint Services Inc. ("SpryPoint") and the Party identified as the "Client" in the Agreement, where Client is using SpryPoint's Software and Services. This DPE reflects the Parties' agreement with regards to the applicable Privacy/Data Protection Laws and governs the data processing related obligations of SpryPoint and Client for any applicable Subscription or Statement of Work involving the processing of Client's Personal Information. In the event of any inconsistency or conflict between this DPE and the Agreement, the terms and conditions of the DPE shall prevail. In delivering the Software or Services under the Agreement, SpryPoint may Process Personal Information/ Personal Data as a Data Processor on behalf of Client, which is the data controller. It is hereby agreed as follows:

1. Definitions

Unless otherwise defined below, all capitalized terms have the meaning given to them in the applicable Agreement and/or exhibits thereto.

a. "C**overed Data**" means:
   i. Client Data;
   ii. Technical Services Data; and
   iii. any other electronic data or information submitted by or on behalf of Client to a Covered Service.
b. "**Covered Service**" means:
   i. any Service provided that specifically refers to this DPE; and/or,
   ii. any Technical Services.
c. "**Data Controller**" means the entity which, alone or jointly with others, determines the purposes and means of the Processing of Personal Data.
d. "**Data Processor**" means the entity which Processes Personal Data on behalf of the Data Controller.

e. "**Data Protection Laws**" means all data protection laws applicable to the Processing of Personal Data under this DPE, including local, state, national and/or foreign laws, treaties, and/or regulations.
f. "**Data Subject**" means the person to whom the Personal Data relates.
g. "**Personal Data"** means any Covered Data that relates to an identified or identifiable natural person.
h. "**Personal Data Breach**" means:
    i. a 'personal data breach' or
    ii. any Security Breach affecting Personal Data.
i. "**Processing**" or "**Process**" means any operation or set of operations performed on Personal Data or sets of Personal Data, such as collecting, recording, organizing, structuring, storing, adapting or altering, retrieving, consulting, using, disclosing by transmission, disseminating or otherwise making available, aligning or combining, restricting, erasing or destroying.
j. "**Subprocessor**" means a SpryPoint Affiliate or third-party entity engaged by SpryPoint or a SpryPoint Affiliate as a Data Processor under this DPE.
k. "**Subprocessor List**" means the list identifying the Subprocessors that are authorized to Process Personal Data for the relevant Covered Service.

2. Subject and Scope

a. Scope and Role of the Parties.

This DPE applies to the Processing of Personal Data by SpryPoint to provide the Covered Service. For the purposes of this DPE, Client and its Affiliates are the Data Controller(s) and SpryPoint is the Data Processor. SpryPoint shall Process Personal Information/ Personal Data under the Agreement(s) only as a processor acting on behalf of Client where Client is the Data Controller, SpryPoint agrees that it will Process Personal Information/ Personal Data for the sole purpose of providing the Services as described in the Agreement(s).

b. Purpose.

Client discloses Personal Information/ Personal Data to SpryPoint solely for:

i. a valid business purpose; and
ii. SpryPoint to perform the Services.

c. Instructions for Processing.

SpryPoint shall Process Personal Data in accordance with Client's documented instructions. Client instructs SpryPoint to Process Personal Data to provide the Covered Service in accordance with the Agreement (including this DPE). Client may provide additional instructions to SpryPoint to Process Personal Data, however SpryPoint shall be obligated to perform such additional instructions only if they are consistent with the terms and scope of the Agreement and this DPE.

d. Prohibitions.

SpryPoint is prohibited from: (i) selling Personal Information/ Personal Data; (ii) retaining, using, or disclosing Personal Information/ Personal Data for a commercial purpose other than providing the Services; and (iii) retaining, using, or disclosing the Personal Information/ Personal Data outside of the Agreement between SpryPoint and Client.

e. Warranty.

Client warrants and represents that it is and will at all relevant times remain duly and effectively authorized to give such instruction.

f. **Sole Responsibility.**

Client is solely responsible for obtaining all necessary consents, licenses and approvals for the collection and Processing of any Personal Information/ Personal Data.

g. Compliance with Laws

SpryPoint shall comply with all Data Protection Laws applicable to SpryPoint in its role as a Data Processor Processing Personal Data. For the avoidance of doubt, SpryPoint is not responsible for complying with Data Protection Laws applicable to Client or Client's industry such as those not generally applicable to online service providers. Client shall comply with all Data Protection Laws applicable to Client as a Data Controller and shall obtain all necessary consents, and provide all necessary notifications, to Data Subjects to enable SpryPoint to carry out lawfully the Processing contemplated by this DPE.

3. Technical, Organizational and Security Measures

a. Security Measures.

SpryPoint implements and maintains appropriate technical and organizational measures to ensure a level of security appropriate to the risk. The parties agree that the security measures are appropriate to protect Personal Information/ Personal Data against a Personal Information/ Personal Data Security Incident, and that these measures ensure a level of security appropriate to the risks presented by the Processing and the nature of the Personal Information/ Personal Data to be protected having regard to the state of the art and the cost of their implementation and the nature, scope, context and purposes of Processing as well as the risk of varying likelihood and severity for the rights and freedoms of natural persons.

b. Confidentiality.

SpryPoint shall ensure that any person authorized to Process the Personal Information/ Personal Data is subject to a strict duty of confidentiality and that they Process the Personal Information/ Personal Data only for the purpose of delivering the Services under the Agreement to Client.

c. SOC 2 Compliance.

Upon request, SpryPoint can provide Client with a copy of its SOC 2 Type II report which attests to the controls at a service organization. SpryPoint may modify its Security Measures from time to time and at any time, provided, however, that it will not materially reduce the level of protection as provided in this DPE.

d. Processing Terms.

At all times that SpryPoint Processes, and/or has access to Personal Information/ Personal Data, SpryPoint shall (a) Process such Personal Information/ Personal Data only in accordance with Client's documented instructions (b) not Sell (as defined under California Consumer Privacy Act) Personal Information/ Personal Data, or retain, use, or disclose such Personal Information/ Personal Data (i) for any purpose other than for the specific purpose of performing the Services or (ii) outside the direct business relationship between Client and SpryPoint.

e. **Acknowledgement.**
Acknowledging that Client (and not SpryPoint): (i) controls the nature and contents of Client Data (including any Personal Information/ Personal Data therein); and (ii) acts as its own system administrator and controls user access to Client Data (including any Personal Information/ Personal Data therein), Client represents and warrants that on the date of this DPE and during the Term:

i. Client will collect and Process Personal Data has been in accordance with applicable Privacy/Data Protection Laws;
ii. Client will take all steps necessary to ensure it achieves the foregoing, including without limitation by:

1. providing Data Subjects with appropriate privacy notices,
2. obtaining any required consent, and
3. ensuring that there is a lawful basis for contracted Processors to Process Personal Data.

4. **Subprocessors**

a. **Use of Subprocessors.**
Client hereby agrees and provides a general prior authorization that SpryPoint and SpryPoint Affiliates may engage Subprocessors. SpryPoint or the relevant SpryPoint Affiliate engaging a Subprocessor shall ensure that such Subprocessor has entered into a written agreement that is no less protective than this DPE. SpryPoint shall be liable for the acts and omissions of any Subprocessors to the same extent as if the acts or omissions were performed by SpryPoint.

b. **Notification of New Subprocessors.**
SpryPoint shall make available to Client a Subprocessor List and provide Client with a mechanism to obtain notice of any updates to the Subprocessor List. At least thirty (30) days prior to authorizing any new Subprocessor to Process Personal Data, SpryPoint shall provide notice to Client by updating the Subprocessor List.

c. **Approved SpryPoint's Sub-Processor List**

Subprocessor	Country	Website	Service Provided
Amazon Web Service	United States	aws.amazon.com	Cloud Infrastructure
Freshdesk	United States	www.freshworks.com	Customer Service
Twilio	United States	www.twilio.com	SMS Delivery Service
Twilio Sendgrid	United States	www.twilio.com/sendgrid/email-api	Email Delivery Service
Solarwinds Papertrail	United States	www.papertrail.com	Log Management Service
Raygun	United States	www.raygun.com	Application Management Service

5. **Rights of Data Subjects**

   a. **Assistance with Data Subject Requests.**
   SpryPoint will, in a manner consistent with the functionality of the Covered Service and SpryPoint's role as a Data Processor, provide reasonable support to Client to enable Client to respond to Data Subject requests to exercise their rights under applicable Data Protection Laws ("Data Subject Requests").

   b. **Handling of Data Subject Requests.**
   For the avoidance of doubt, Client is responsible for responding to Data Subject Requests. If SpryPoint receives a Data Subject Request or other complaint from a Data Subject regarding the Processing of Personal Data, SpryPoint will promptly forward such request or complaint to Client, provided the Data Subject has given sufficient information for SpryPoint to identify Client.

   c. **Cooperation.**
   To the extent SpryPoint is required under Privacy/Data Protection Laws, SpryPoint will assist Client to comply with Privacy/Data Protection Laws; in particular (i) SpryPoint will assist Client in responding to any request from a data subject exercising his or her rights under the Privacy/Data Protection

Laws; (ii) it will assist Client in responding to any request from regulatory or judicial bodies relating to the Processing of Personal Information/ Personal Data under the Agreement(s); (iii) it will promptly notify Client if its Processing of Personal Information/ Personal Data is likely to result in a high risk to the privacy rights of data subjects or is unable to comply with Client's instructions for any reason, (iv) and upon reasonable request, will assist Client to carry out data protection impact assessments.

6. SpryPoint Personnel

SpryPoint shall require screening of its personnel who may have access to Personal Data and shall require such personnel (i) to Process Personal Data in accordance with Client's instructions as set forth in this DPE, (ii) to receive appropriate training on their responsibilities regarding the handling and safeguarding of Personal Data; and (iii) to be subject to confidentiality obligations which shall survive the termination of employment.

7. Personal Data Breach

In the event SpryPoint becomes aware of a Personal Data Breach it shall without undue delay notify Client in accordance with the Security Breach provisions of the Master Subscription Agreement. To the extent Client requires additional information from SpryPoint to meet its Personal Data Breach notification obligations under applicable Data Protection Laws, SpryPoint shall provide reasonable assistance to provide such information to Client taking into account the nature of Processing and the information available to SpryPoint.

8. Security Program

SpryPoint shall implement appropriate technical and organizational measures designed to protect Personal Data against accidental or unlawful destruction, loss, alteration, unauthorized disclosure of, or access to Personal Data. If SpryPoint becomes aware of a security incident or has a reasonable suspicion of a Personal Information/ Personal Data breach in respect of the Personal Information/ Personal Data being Processed under the Agreement(s), it will inform Client without undue delay and will provide reasonable information and cooperation to Client so that Client can fulfill any Personal Information/ Personal Data Security Incident

reporting obligations it may have under the applicable Privacy/Data Protection Laws. SpryPoint will take reasonably necessary measures to remedy and mitigate the effects of the security.

9. Audit

SpryPoint will use external auditors to verify the adequacy of its security measures and controls for the Software and Services provided under the Agreement. The resulting audit will: (i) be performed according to AICPA SOC2 Type II standards or such other alternative standards that are substantially equivalent to AICPA SOC2 Type II; (ii) be performed by independent third-party security professionals at SpryPoint's selection and expense; and (iii) result in the generation of a SOC 2 Type II report ("Audit Report"), which will be SpryPoint's Confidential Information. The Audit Report can be made available to Client upon written request no more than annually subject to the confidentiality obligations of the Agreement or a mutually agreed non-disclosure agreement covering the Audit Report. For the avoidance of doubt, each Audit Report will only discuss Software and Services in existence at the time the Audit Report was issued.

Client agrees that SpryPoint's then-current SOC 2 Type II audit reports will be used to satisfy any audit or inspection requests by or on behalf of Client.

10. Return and Deletion of Client Data and Personal Data

Upon written request by Client made prior to or upon any expiration or termination of this Agreement, SpryPoint will make Client Data available to Client through the Service solely to allow Client to retrieve Client Data for a period of up to a total of sixty (60) days after such expiration or termination (the "Retrieval Period"). After such Retrieval Period, SpryPoint will have no obligation to maintain or provide any Client Data and shall thereafter, unless legally prohibited, delete all Client Data by deleting Client's Tenant. provided, however, that SpryPoint will not be required to remove copies of the Client Data from its backup media and servers until such time as the backup copies are scheduled to be deleted, provided further that in all cases SpryPoint will continue to protect the Client Data in accordance with this Agreement. Client Data will be made available in a SpryPoint-supported format mutually agreed upon between the parties (for example, CSV, delimited text or Microsoft Excel). The foregoing deletion obligation will be subject to any retention

obligations imposed on SpryPoint by Law. Additionally, during the Term of the Agreement, Clients may extract Client Data using SpryPoint's standard web services. Upon termination of the Covered Service, SpryPoint shall return and delete Personal Data in accordance with the relevant provisions of the Agreement.

11. General Provisions

a. Client Affiliates.
Client is responsible for coordinating all communication with SpryPoint on behalf of its Affiliates with regard to this DPE. Client represents that it is authorized to issue instructions as well as make and receive any communications or notifications in relation to this DPE on behalf of its Affiliates.

b. Termination.
The term of this DPE will end simultaneously and automatically at the later of:

i. the termination of the Agreement; or
ii. when all Personal Data is deleted from SpryPoint's systems.

c. Conflict.
This DPE is subject to the non-conflicting terms of the Agreement. With regard to the subject matter of this DPE, in the event of inconsistencies between the provisions of this DPE and the Agreement, the provisions of this DPE shall prevail with regard to the parties' data protection obligations.

d. **Client Affiliate Enforcement.**
Client's Affiliates may enforce the terms of this DPE directly against SpryPoint, subject to the following provisions:

i. Client will bring any legal action, suit, claim or proceeding which that Affiliate would otherwise have if it were a party to the Agreement (each an "Affiliate Claim") directly against SpryPoint on behalf of such Affiliate, except where the Data Protection Laws to which the relevant Affiliate is subject require that the Affiliate itself bring or be party to such Affiliate Claim; and
ii. for the purpose of any Affiliate Claim brought directly against SpryPoint by Client on behalf of such Affiliate in accordance with this

Section, any losses suffered by the relevant Affiliate may be deemed to be losses suffered by Client.

e. **Remedies.**
Client's remedies (including those of its Affiliates) with respect to any breach by SpryPoint or its Affiliates of the terms of this DPE and the overall aggregate liability of SpryPoint and its Affiliates arising out of, or in connection with the Agreement (including this DPE) will be subject to any aggregate limitation of liability that has been agreed between the parties under the Master Subscription Agreement section 8.1. For the avoidance of doubt, the parties intend and agree that the overall aggregate liability of SpryPoint and its Affiliates arising out of, or in connection with the Agreement (including this DPE) shall in no event exceed the amount agreed to in section 8.1 of the Master Subscription Agreement.

This Statement of Work number 1: Workday Deployment (this "SOW"), effective as of April 3, 2025, (the "**Service Date**"), is by and between City of Idaho Falls ("City of Idaho Falls" or "Client") and Strada U.S. Professional Services, LLC ("Strada" or "Supplier" and, together with Client, each a "Party" and collectively the "Parties"). This SOW adopts and incorporates by reference the terms and conditions of that certain Framework Services Agreement, effective as of April 3, 2025, by and between [Client and Strada] (the "FSA"). Any amendment or modification of the FSA after the Service Date shall have no effect on this SOW unless otherwise agreed by the Parties. Capitalized terms used but not defined in this SOW shall have the meanings ascribed thereto in the FSA. In consideration of the mutual covenants contained herein, and other valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

I. STATEMENT OF WORK TERM

The term of this Statement of Work will commence on the Service Date and shall end on September 25, 2026, unless sooner terminated in accordance with the Agreement or this SOW. Client may terminate this SOW for convenience upon notice to Strada at least 60 days prior to the service effective thereof.

II. PROJECT OVERVIEW / BACKGROUND

This Statement of Work describes the Services related to the configuration, testing and deployment of the Workday solution as described herein (the "Workday Solution" or "Workday") and the Client Tenant for Client. Strada is not responsible for any services, tasks or functions not identified as a Strada responsibility herein; Client or its third-party providers and vendors shall retain responsibility for all services, tasks or functions identified as a Client responsibility herein. Strada may utilize deployment automation tools in the performance of the Services.

The Workday functional and technical parameters of the project described in this SOW derives from an analysis by Strada of Client's provided documentation, including as reflected in the requirements document that was submitted by Strada as part of its response to Client's RFP (such requirements document is the "**Worksheet A_Functional Requirements"**) which is incorporated herein by reference (**Functional Requirements_Idaho Falls_Strada_SpryPoint_FINAL 20250328)**. The scope is more specifically described in the Service Parameters and other areas of this SOW. Strada represents that the scope of the **Functional Requirements_Idaho Falls_Strada_SpryPoint_FINAL 20250328**, as reflected in this SOW, is sufficient for the proper deployment of the Workday Solution for the Client's organization. Strada will reasonably consider the baseline functional and technical requirement response information provided in the **Functional Requirements_Idaho Falls_Strada_SpryPoint_FINAL 20250328**, along with the Workday Solution's generally available functionality as the configuration of the Workday Solution deployment. Strada consultants will conduct foundational, design/configuration workshops (as defined in the RACI) to develop the Requirements Design Guides (RDG) on the project. The RDG will serve as the requirements to testing scenarios and as a control measure to ensure Strada owned configuration related to the **Functional Requirements_Idaho Falls_Strada_SpryPoint_FINAL 20250328** are delivered during the implementation.

The Workday Prescriptive Solution, module-level feature and functionality of the Client Tenant to be configured, tested and deployed by Strada includes the following:

- Core HCM
    - Absence
    - Benefits
    - Core Compensation
    - Onboarding
- Payroll
- Time Tracking

- Learning
- Talent Optimization
- Recruiting
- Candidate Engagement
- Messaging
- People Experience - Journeys
- People Experience - Workday Help
- Core Financials
    - Financial Accounting
    - Foundation Data Model
    - Banking and Settlement
    - Customer Accounts
    - Supplier Accounts
    - Budgets
    - Business Assets
- Procurement
- Projects
- Financial Planning
- Inventory
- Funds & Grants
- Expenses
- Prism

In addition, Client has selected the following services provided by Strada:

- Test Management
- Change Management
- Readiness
- Custom Reporting

III. PROJECT DEPLOYMENT APPROACH

Strada's Workday deployment methodology consists of the following stages: Plan, Architect & Configure, Test and Deploy. The specific tasks and deliverables to be completed within each of these stages are detailed in the Project Responsibilities section located in the Appendix. Strada's deployment methodology assumes the use of Strada specific tools, templates, and best practices. The schedule and fees are dependent upon the use of Strada's tools and methodology.

IV. TIMELINE

The timing and duration of this project timeline are critical components of the estimated professional fees and staffing for this defined scope of work, and any modification may result in the need for adjustment in accordance with the Change Order procedure. The project plan shall be developed and finalized during the Plan stage of phase 1a and Phase 1b based on the timelines below.

Phase 1a – HCM/FINS/ Payroll
Phase 1a is based on a 68-week project timeline. The timeline assumes a Plan Phase start date of June 9, 2025 (the "Start Date") with a move to production on June 19, 2026 (the "Move to Production Date"). Pre-Plan activities begin 6 weeks prior to the Start Date. Stabilization support begins on the Move to Production Date and lasts for 8 weeks immediately following. Stabilization support or hypercare does not confer ownership or responsibility for completion.

	Readiness	Plan	Architect & Configure	Test	Deploy	Post-Deployment	Total
Estimated Weeks	6	6	29	15	4	8	68
Start Date	4/28/2025	6/9/2025	7/21/2025	2/9/2026	5/25/2026	6/22/2026	4/28/2025
End Date	6/6/2025	7/18/2025	2/9/2026	5/22/2026	6/19/2026	8/14/2026	8/14/2026

Phase 1b – Financial Planning

Phase 1b is based on an 18-week project timeline. The timeline assumes a start date of 4/6/2026, with a with a move to production on 7/10/2026, followed by a 2-week stabilization and support stage. It also assumes that formal a project kick-off will take place on the week of 4/13/2026 marking the start of the Architect & Configure stage.

	Plan	Architect & Configure	Test	Deploy	Post Deployment	Total
Estimated Weeks	1	8	3	2	4	18
Start Date	4/6/2026	4/13/2026	6/8/2026	6/29/2026	7/13/2026	4/6/2026
End Date	4/10/2026	6/5/2026	6/26/2026	7/10/2026	8/7/2026	8/7/2026

Phase 2 – Messaging

Phase 2 is based upon a 12 -week project timeline. The timeline assumes a Plan Phase start date of July 6, 2026 (the "Start Date") with a move to production on September 11, 2026 (the "Move to Production Date"). Stabilization support begins on the Move to Production Date and lasts for 10 business days immediately following. Stabilization support or hypercare does not confer ownership or responsibility for completion.

	Plan	Architect & Configure	Test	Deploy	Post Deployment	Total
Estimated Weeks	2	5	1	2	2	12
Start Date	July 6, 2026	July 20, 2026	August 24, 2026	August 31, 2026	September 14, 2026	July 6, 2026
End Date	July 17, 2026	August 21, 2026	August 28, 2026	September 11, 2026	September 25, 2026	September 25, 2026

Timeline

1. The timing and duration of this project timeline are a critical component of the estimated professional services for this scope of work. If the Start Date is delayed, Client acknowledges that Strada's ability to meet the target Move to Production Date is at risk.
2. Client acknowledges responsibility for identifying appropriate project resources to complete the Workday recommended training path(s) in alignment with the timing and duration of the project. Failure to complete or deferment of training will result in a risk to the project milestones, and critical artifacts.

3. Delays introduced by Client resulting in missed deadline dates for project milestones or critical artifacts will impact Strada's ability to meet the target Move to Production Date. Project milestones include but are not limited to Foundation Alignment, Customer Confirmation, and Vendor Workshops.
4. The parties agree to review any replanning or modifications in the scoped effort of Strada resources as a result of timeline or scope impact through the Change Control Process. Strada will work closely with Client to identify the impacts of any delays and will discuss the best available options before collaboratively determining the next steps.

V. PROJECT ASSUMPTIONS

Employee Count and Geography

Client has an employee population of 750. The population may vary slightly over the course of the deployment; however, this population is the basis for scoping, planning, and pricing.

1. Populations stated above reflect the estimated end-user population at the Move to Production Date. This includes but is not limited to full-time employees, part-time employees, contingent workers, agency contractors, independent contractors, temporary employees, seasonal employees, interns, and volunteers.
2. All other locations are considered out of scope.

Overall Responsibilities

1. Client agrees to utilize Workday's delivered business processes ("BPs") across the enterprise. Business processes noted as modifiable in the assumptions section of this document may be altered to remove steps, reorder steps, or change role assignment where the role exists in the delivered Workday pre-configuration.
2. Strada will provide foundation knowledge transfer to core Client project team members responsible for supporting the system in production. This knowledge transfer will be accomplished through the Client team's active participation in project milestones, artifacts, and other related activities.
3. Client will provide appropriate subject matter experts with decision-making authority for the duration of the project. These resources are required to participate in project milestones, artifact completion and other project activities including but not limited to Readiness, requirement gathering sessions, Foundation Alignment, Customer Confirmation, Vendor Workshops, testing cycles and cutover.
4. Strada will conduct a single set of sessions for all project related activities, meetings, or workshops.
5. Client will own alignment and acceptance from internal stakeholders and business process owners across all areas.
6. Strada shall have the sole right to utilize its implementation methodologies and other best practices and to supervise and manage its representatives performing the Services.

Project Administration

Program Structure

The implementation services provided by Strada and SpryPoint will each be referred to as a "project" and as such each project shall have a Vendor Project Manager to manage the day to day of these projects. Both the Strada and SpryPoint Project Manager will align with the Strada Program Executive to support program reporting and program

meetings. Strada will serve as the overall Program Manager for both projects and will serve as the escalation point for issues arising from both the Workday and SpryPoint implementations. Please refer to Exhibit B – Program Management Overview – Strada Workday and SpryPoint Work Order implementation.

1. The Strada Project Manager will be responsible for management of Strada owned tasks and responsibilities. The Client Project Manager will be responsible for management of Client owned tasks and responsibilities.
2. The Strada Project Manager will be responsible for scheduling and setting the agenda for the project status meeting held weekly, not to exceed 60-minutes.
3. The Strada Project Manager will act as the representative of the Strada team for the project status meeting. Additional Strada personnel will attend the status meeting based on the health of the project, timeline, workstream health or cross-functional escalations. The Strada Project Manager will ensure the status report is updated prior to the status meeting.
4. At the close of Readiness, Strada and Client Resources will work jointly to ensure each workstream has a weekly scheduled session not to exceed one hour. The sessions will include requirements review, testing support and knowledge transfer based on project timeline progress.
5. Strada and Client resources will be responsible for maintaining the project RAID log, located on the Strada project Smartsheet workspace. Client project manager will be responsible for following up on Client-owned issues as indicated on the RAID log.
6. Client shall permit and arrange for access to Client records requested by Strada that are reasonably necessary to perform the Services under this SOW.
7. The Strada Project Manager, HCM consultant and Financial Accounting consultant will provide onsite go live support for up to 3 business days. All other onsite travel or participation will be governed by the Change Order process.
8. Client will utilize Strada's system tools, templates, methodologies, and practices for deployment, including but not limited to: project work repositories, data storage, testing management, and an integrations database. A baseline inventory of tools and their purpose is included as Exhibit A. Any deviation from Strada's standard tool set that is required by Client could have an impact on the implementation timeline and will be subject to a change order to address Strada's additional effort and costs associated with using the non-standard tool(s). Tools usage includes but is not limited to the tools identified in Exhibit A.
9. The Strada team will use Strada laptops, and all secured data will leverage Project security data transfer protocols such as Strada MFT / Move IT. Using alternative or client laptops will require a change order and could significantly impact the project timeline.
10. Client is responsible for all aspects Executive Committee meeting including but not limited to scheduling, agenda creation, presentation, and meeting execution. Only the aligned Strada PMO resource (e.g., Project Manager, or Program Executive) will attend. If additional attendees are required or Strada is asked to prepare Executive Committee content, an additional Change Order will be agreed upon between the Client and Strada.
11. If at any time during the project, Client or Strada determines that the deployment approach is no longer appropriate, an immediate notification should occur to the Project Executive Committee so the effort can be re-planned, re-scoped and re-priced.
12. Any SKU and functionality not listed in the Appendix are out of scope. Additionally, any new functionality delivered by Workday in an update during the Architect & Configure phase of the project, as indicated by creation of the configuration tenant, is out of scope unless set out in this Statement of Work.
13. Relative to integration approach, Strada will build each Strada-owned integration during the Architect & Configure stage. For outbound, unit testing is the process of verifying that the output file from the integration matches the requirements and the identified unit test cases are completed successfully. When possible, in the Architect & Configure stage, Strada will send a file for confirmation to the vendor to ensure that it passes basic formatting, transmission and structural needs. If not possible in the Architect & Configure stage, this will be done as part of End-to-End testing. For inbound, unit testing is a verification of the process to import a file to Workday. Securing a sample file from the integration vendor to support

this test is the ideal approach. If this is not possible the Strada resource will mockup a test file and testing with the vendor will happen as part of End-to-End testing.

a. Client will inform and secure necessary contacts for each Included integration with the vendor prior to Customer Confirmation sessions.
b. Client will provide specifications and answer discovery questionnaires for each interface prior to integration workshops conducted during the Architect & Configure stage.
c. Client to provide contacts for all integrations Included for setting up the initial vendor sessions at the onset of the Plan stage.
d. Client is responsible for scheduling the initial vendor sessions, coordinating with the Strada integration team.
e. Strada will conduct integrations workshops in the Architect & Configure stage for each Included integration.
f. Client will approve documented requirements within 5 days of receiving draft documents from Strada.
g. Strada will generate a design for each integration during the Architect & Configure stage that are Strada-owned or Shared Development.

Strada and Client Obligations

1. Strada will provide Workday certified resources skilled in all in-scope domains to adequately and successfully fulfill Client needs within this deployment scope.
2. Client will commit the necessary resources and management to perform their obligations outlined in this SOW in a timely manner. Those resources will have appropriate training, subject matter expertise and knowledge of Client needs to perform their project responsibilities.
3. Client resources allocated to the project will receive the necessary Workday training to fulfill their project responsibilities in advance of the Customer Confirmation Sessions. Delays incurred due to resources not taking the relevant training will be the responsibility of the Client.
4. Client will identify their ongoing / administrative support resources at the completion of the Plan stage and validate those resources have received the necessary Workday training prior to the move to Workday production.
5. Both Strada and Client shall use commercially reasonable efforts to maintain the continuity of its project team throughout the term of the SOW. Should Client reasonably determine that a Strada employee be removed from the project, (a) Client will notify Strada and provide specific examples related to the business reason for such removal, (b) Strada will have an opportunity to take appropriate developmental or disciplinary action to prevent a recurrence of the issue based on feedback provided by Client and (c) if employee performance does not improve, Strada will, in good faith, replace the employee with a new team member within a timeframe that prudently enables a timely replacement while allowing Strada to continue to deliver on its commitments set forth in this SOW.
6. Solicitation of Personnel. Each Party agrees that it shall not solicit for employment any employee of the other Party or any of its affiliates that performed or received Services under any SOW with whom such Party had contact in connection with such Services during the term of such SOW and for a period of twelve (12) months after the earlier of: (i) its expiration or termination; or (ii) the employee's completion of his/her work under the SOW. Such restriction shall not apply to a Party's general recruiting activities that are not specifically targeted at employees or an employee of the other Party or any of its affiliates.

VI. FEES AND INVOICING

Based on the Project Scope, Project Assumptions and Project Timeline identified, Strada estimates professional Fees for this effort are a total fixed fee as indicated in the table below exclusive of travel expenses.

Strada will promptly notify Client at any time during the execution of the Project Scope of this SOW if a requested scope change could result in a change that would follow the Change Order procedure.

The fees set forth in this SOW are valid for signature for up to 90 days from the service date denoted on the SOW. The fees are subject to change upon expiration of the 90-day term if the SOW signature is not achieved.

Strada will bill Client for its Fees using milestone-based invoices triggered by Client's acceptance of the identified project milestone. If the project timeline changes at the request of the Client and there is agreement to modify the milestone payment schedule, this will be handled through the Change Order Procedure. The table below details the invoicing schedule with all monetary amounts expressed as US Dollars.

Milestones Invoicing Schedule:

Payment	Approximate Invoice Date	% of Total Contract	Entrance Criteria	Invoice Milestone	Gross Calculated Amount	5% Retainage	Invoice Total
1	July 1, 2025	5%	Readiness phase initiated	Readiness	$ 152,235.00	$ (7,611.75)	$ 144,623.25
2	August 1, 2025	10%	Plan phase initiated	Plan	$ 304,470.00	$ (15,223.50)	$ 289,246.50
3	November 1, 2025	20%	Architect & Configure phase initiated	Architect	$ 608,940.00	$ (30,447.00)	$ 578,493.00
4	March 1, 2026	20%	Customer Confirmation Sessions initiated	Configure	$ 608,940.00	$ (30,447.00)	$ 578,493.00
5	May 1, 2026	15%	Test Phase initiated	Testing	$ 456,705.00	$ (22,835.25)	$ 433,869.75
6	June 1, 2026	15%	Parallel testing initiated	Payroll Parallel	$ 456,705.00	$ (22,835.25)	$ 433,869.75
7	July 1, 2026	10%	Deploy phase initiated	Deploy	$ 304,470.00	$ (15,223.50)	$ 289,246.50
8	September 1, 2026	5%	Go Live date (Phase 1a) met	Post-production	$ 152,235.00	$ 144,623.25	$ 296,858.25
9	October 1, 2026		Phase 2 initiated	Post-production	$ 13,530.00		$ 13,530.00
Net Total							**$ 3,058,230.00**

* Please refer to the Idaho Falls Invoice Milestone Acceptance attachment to this SOW for specific deliverables related to each Milestone payment.

Client will reimburse Strada for the reasonable and necessary out–of–pocket travel expenses incurred by Strada in connection with the Services performed under this SOW, including air and surface transportation, lodging, car rental, and meals, in accordance with the Strada's Travel and Expense Policy. All travel to Client locations that may result in such expenses will be pre–approved by Client.

Strada will invoice Client monthly for actual expenses incurred (expenses invoice) in the previous calendar month. Strada has estimated $300,000.00 in travel expenses for this project. Any travel expenses beyond this amount would need to go through the Change Order process. Expense invoices will include each Strada resource that had billable expenses for the calendar month, including, resource name and total expenses. Any additional information required for payment must be identified in this Statement of Work.

Financial reporting requests that exceed Strada's standard outputs may be subject to the Change Order procedure. Client will submit payment for all invoices within 30 days of receipt of the invoice by Client. Interest at nine percent (9%) per year will accrue on all past due amounts from the corresponding due date until payment is received.

Strada will communicate invoices and any supporting documentation via email. Invoices will be sent to the following Client contact:

Name: Email: Client PO#

If the PO# is not included in this Statement of Work, Strada will not be required to provide it on its invoices to ensure payment within the set payment terms.

Travel Arrangements. Personnel assigned by Strada to perform the services requested by Client will at times be required to travel to Client. The specifics of the travel arrangement are further detailed in this Statement of Work. Personnel assigned by Strada will not be required to be at Client more than four (4) days during the week. Personnel will make no flight connections unless the layover is one and one half (1.5) hours or less. Personnel will make no more than one (1) connection if other options are available.

Client will need to contract with Workday directly for Training services that are required by Workday on every deployment, and which are not part of this Statement of Work. Workday can provide guidance on appropriate training for Client resources participating in the project effort.

VII. CHANGE ORDER PROCEDURE

Notwithstanding the terms of the Agreement, any modified or additional scope of services that are not contained in the Project Scope of this Statement of Work will require a formal Change Order request to be created. Strada will inform customer of Project Scope variations at the end of the Architect stage. The Change Order Request will contain the following information:

- Description of scope change
- Client requestor
- Rationale
- Cost
- Any potential impact to project timeline
- Any constraints/risks

- Importance

The Change Order Request will be reviewed and signed by the Client Project Manager and Strada Project Manager before Strada begins performing the new services and any associated costs are incurred. Delays in Client's agreement to a Change Order may result in the Change Order being fulfilled on a timeline later than the initial deployment move to production date.

Any Change Order for Fixed Fee project will use the table below for calculation of fees. Strada will deliver the total cost as part of the Change Order request.

Fixed Fee Rate Calculation Table

Role	Rate
Program Executive	$365.00
Project Manager	$270.00
Project Coordinator	$130.00
Analyst	$45.00
Senior Analyst	$60.00
Associate Consultant	$160.00
Consultant	$225.00
Lead	$270.00
Testing Lead	$270.00
Testing Analyst	$180.00
Change & Training Consultant	$225.00
Change Management Lead	$270.00
Change Management Advisor	$365.00
Technical Project Manager	$270.00
Technology Architect	$305.00
Enterprise Architect	$495.00
Functional Architect	$305.00
Optimization Architect	$305.00
Extend Architect	$270.00

SIGNATURE

This Statement of Work shall be attached to and incorporated into the Agreement and is subject to all the terms and conditions of the Agreement, except as modified herein.

City of Idaho Falls	**STRADA U.S. PROFESSIONAL SERVICES, LLC**
By: _____	By:_____
Name:_____	Name:_____
Title: _____	Title: _____
Signature Date: _____	Signature Date: _____

Appendix

Service Parameters

Pre-Deployment Readiness

Workday deployments are different than traditional on-premise implementations. Workday has a rapid and iterative deployment methodology, and you need to be prepared. Our readiness services will help you to identify potential gaps and actions that can be addressed now to reduce system deployment risks and to get ahead of project resource planning. Our proposed services include the following key activities over a 6-week period:

- Pre-deployment readiness workshops include:
  - Stakeholder Interview
  - Project readiness
  - Foundational readiness
  - Data conversions
  - Integrations
  - Reporting
  - Project team training – initial planning
  - Cutover planning overview
  - Change Management readiness
- Identify foundational items that can be addressed prior to the start of system deployment with a key focus on items such as organizations, staffing model, and job catalog. Introduce key design decisions such as position management approach, manager self-service approach, and system workflow guiding principles.
- Stakeholder interviews with key PMO leaders and/or business unit leaders will be conducted to identify potential risks to the project, business concerns, etc.
- These workshops allow a jump-start on deployment project planning including defining your project governance model, project timeline, project guiding principles, project resource needs, project team roles and responsibilities, and training needs

Test Management Services

Essential Testing with Automation	
Area	**Scope**
Workshops and meetings	• Test Lead Checkpoints • Testing Workstream Kickoff • Introductions • Timeline/Project Plan Review • Test Strategy Review • Configuration Unit Test (CUT) Plan Workshop • CUT Execution Kick Off and Jira training • Strada Test Automation Introduction • End to End Test (E2E) Plan Workshop • E2E Execution Kick off Meeting • Integration Test Approach • Defect review meeting support • Phase Exit Meetings

Artifacts	• Test Strategy • Test Plans - Configuration Unit Test, End to End Test, Integration • Test • Weekly Program Test Status Report • Project Plan • Baseline CUT Test Scenarios • Jira Training Presentation • Jira Reference Guide • E2E Baseline Scenarios • Integration Tracker/Schedule Template • Example Integration Test Scenarios • Realtime metric reporting • Phase exit workbooks (CUT & E2E) • Summary extract of Jira scenarios & bugs
Jira testing tool support	• Set up project • Add Jira dashboards • Add Executive Summary reports • Add users • Load test scenarios • Load conversion defects • Audit Jira

Change Management

What follows is a summary of activities and deliverables that are included in Strada's change management support model.

Activity/Deliverable	Scope
Stakeholder Analysis	Using Strada's template, perform high-level analysis to determine specific stakeholders and stakeholder groups that require regular change management interaction; client to provide inputs
Impact Analysis	Using Strada's template, perform detailed analysis in conjunction with functional/technical SMEs to capture key variations from current state to future state; changes may be technical, policy, process, cultural, or organizational in nature. Client to provide inputs.
Change Management Strategy	Establishes the overarching framework for the Change Management Workstream; includes overall scope, overview and goals, framework for delivery, risks and success measures, and a high-level timeline
Communication & Engagement Plan, including delivered communications	Detailed approach that reflects target audience, key messages, communication channels, etc.; to ensure that key messages are communicated in a controlled fashion, to the right audiences, at the right time, in the right manner. Includes up to 25 delivered communications.

Activity/Deliverable	Scope
Training Activity/Deliverable Plan, including training materials and delivery	Detailed, role-based approach that reflects training objectives/approaches for each activity for key audiences; includes the following: • Up to 30 job aids • One microlearning video • One concept deck • Up to 20 hours of co-facilitation support via train-the-trainer/instructor-led training
Change Network Plan, including materials	Plan to engage with change network participants on a regular (i.e., monthly) basis to form basis for two-way feedback, localized support and buy-in; includes five sets of materials associated with facilitation. Actual facilitation, including logistics, to be retained by the client.
Sustainment Strategy	Development of strategy for ensuring the organization is ready to sustain change over time, achieve target adoption rates and prepared for ongoing tool releases; includes counsel on Workday-provided support resources
Measurement: Business Readiness, Adoption Measurement	Metrics-based approach to validate that end-user readiness/adoption is on track to achieve target levels: • Series of pre-go live (two) and post-go live (one) pulse surveys that provide insights into effectiveness of change management efforts. Includes review of findings and strategic recommendations (if necessary) • Identification of metrics/measures that serve as indicators of attaining target adoption levels
Detailed Work Plan	Development and ongoing management of work plan for the Change Management workstream

- Strada will retain leading role/execution of change management activities and deliverables as the overall workstream progresses
- Strada will provide access to tools, templates, consulting support throughout the deployment
- Strada will provide project management support for the change management work, including a detailed plan and review schedule and PMO reporting
- Core communication audiences for Strada-led materials includes business-facing Field HR/Finance Professionals, Managers and Employees; focus is on “enterprise” materials; smaller audiences with unique needs and/or tailoring are client-retained (e.g. “targeted”)
- Client will own the distribution of communications, training, and readiness surveys
- Core training audiences for Strada-led materials includes business-facing Field HR/Finance Professionals, Managers and Employees; excludes super users, project team members, Operating Model/Tier 1 support, back-office teams, etc.
- Job Aids provide step-by-step instructions and are single-sided/created in Word/PDF
    - HCM-specific job aids are two-to-three pages in length
    - Financials-specific job aids are four-to-six pages in length.
- Training/microlearning video is a short (1-3 minutes in length) recording of the system that provides tool navigation overviews. It includes supporting text on the screens, with audio, created in Camtasia.

- Concept deck provides an overview of basic Workday concept(s). It includes up to 15 slides (with speakers notes), created in PowerPoint.
- Strada to provide co-facilitation support for train-the-trainer/instructor-led training of up to 20 hours; client to provide co-facilitation support plus retain ownership for coordinating all logistics (e.g., distribute invites, secure rooms, etc.). Presentation style materials are comprised of a PowerPoint deck (one version), up to 20 slides (plus speakers notes).
- Strada will provide a workstream Subject Matter Expert (SME) to review training and communications content for technical accuracy
- Client will provide SMEs review and approve training and communications materials based on a pre-defined development schedule
- All communication and training materials are subject to a three-draft review/approval process (first, second, final) and are provided in American English; any needs for translation of materials are client-retained
- Change Management is dependent upon a tenant to capture screenshots for communications and training materials
- This solution is targeted for the go-live date; to the extent feasible, training materials will be built with a long-term sustainability lens

Functional Configuration Parameters

This appendix identifies the assumptions associated with the deployment approach. These parameters encompass the recommendations on scope volume or exclusion based on the availability of pre-configuration to accelerate deployment for the initial go live.

Column Definitions

The following table clarifies the columns included in this appendix.

Column Name	Column Description
Functional Area	Functionality provided within Workday or scope groupings such as Modifiable Business Processes (Modifiable BPs), Reporting or Data Conversion. This section also captures "Features Not Deployed as Part of this SOW for Initial Go Live", which does not preclude the customer from deploying it at a later time, it only limits the functionality from the initial go-live to define a manageable scope that can be configured, tested and deployed within the timeline of the deployment.
Feature Definition	Clarification or definition of Functional Areas or Scope Areas

Column Name	Column Description
Scope Assumptions	Values • Included = will be configured for customer where necessary to meet customer's business requirements within reasonable ranges given the employee count and geography • WD Delivered = Workday Delivered functionality or pre-configuration provided on an as-is basis • Up to = a boundary on configuration volume for the functional area to aid in scoping effort for Strada and Client teams Thresholds in the scope assumptions column are considered maximum scope, actual volumes deployed is based on what is provided by Client. Reducing or increasing volumes in the scope assumptions listed below might not always have a direct impact on cost estimates, depending on the amount of foundation configuration required for the entire area of work. (For example, creating an additional salary plan does not take the same amount of time as creating the first one as it can re-use some of the configuration done previously. Similarly, reducing the scope by 1 salary plan will not have a significant impact on the overall effort, as the foundation configuration needs to be done for the remaining plans anyway. However, the number of Absence or Benefit plans, due to their potentially complex nature, is more likely to have a direct impact on the effort and cost. Hence, any change to scope and its potential impact on the project duration and/or budget will need to be assessed on a case-by-case basis). Delivering less than a declared threshold does not amount to a “service credit” to be used elsewhere.

HCM Parameters

Foundational

Functional Area	Feature Definition	Scope Assumptions
Organizational Management	Organizations are groups of resources, workers, costs, and other organizations for business process routing, security, analysis, and reporting. Along with roles and hierarchies, organizations are part of the foundation that provides configurable and contextual security within Workday. The way that organizations are configured influences everything from staffing models and role assignments to physical locations and reporting.	Included
Address Localization	Workday formats address based on location	Included
Staffing Management	Position Management vs Job Management Staffing model	Included

Contact Information	Employee's primary and additional Phone, Address, Work, Email Data	Included
Personal Information	DOB, Place of Birth, marital Status, Race Ethnicity, Citizenship	Included
Payment Elections	Check, direct deposit information	Included
Job and Position Assignment	All workers are assigned to a specific position vs Job Management - no defined quantity	WD Delivered
Supervisory Organization and Hierarchy	Supervisory Organizations group workers into a management hierarchy. Supervisory Organizations can be a business unit, department, group, or project. Jobs, positions, and compensation structures are associated with supervisory organizations and workers are hired into jobs or positions associated with a supervisory organization. Each worker can only be a part of one supervisory organization.	One Supervisory Hierarchy
Locations and Location Hierarchy	Locations where workers work; Hierarchy is a roll up of the locations with the workers and is used for reporting purposes	Up to 500 Locations in One Location Hierarchy
Companies and Company Hierarchies	Reflect your legal entities. There should only be one FEIN per company. Hierarchy is a roll up for reporting purposes.	Up to 25 Companies in One Company Hierarchy
Cost Centers and Cost Center Hierarchy	Cost centers are used to group workers by related revenues and expenses. Track financial transactions and HCM transactions with a financial impact, such as hiring or terminations	Up to 500 Cost Center Organizations in One Cost Center Hierarchy
Regions and Regional Hierarchy		Up to 50 Regions in One Regional Hierarchy
Custom Organizations and Hierarchy	Additional organization used when WD orgs will not capture client's organizational requirements.	Up to 2 Custom Organizations in One Custom Organization Hierarchy
Currencies	Currency rate types enable you to establish more than one conversion rate for the same currency pair and time period.	Included

Employee Types	A user-defined type that you assign to each employee when the employee is hired. Primarily informational only; you can search or filter employees by their employee type. However, you can designate a type as Fixed Term Employees, and employees of that type have fixed end dates of employment.	Up to 7
Contingent Workers	Contractor, Consultant, Vendors, etc.	Included
Pre-Packaged Business Processes	Standard business process used by most organization for transactional purposes	Business Process Framework for all orgs, manager, and employee self-service
Language Support (Translations)	This covers the translation of client provided data within the available Workday fields	English Only
Delivered Security Model	Assign security at the top level of the hierarchy, then uses WD's inheritance for visibility and support	WD Delivered
Two Factor Authentication	2 step authentication process for sign on	Included
Mobile	Mobile functionality for security groups activated for the following functionality: People Directory with search, Organization Chart, Workfeed Inbox, Self-Service tasks, Announcements, Time Entry, Time Off, Pay slips, Expense Reports, Worker Profile, Personal Notes, Performance Reviews, Delivered Dashboards & reports only	WD Delivered
Standard Notification Templates	When Workday uses an email template, it constructs the message from the specified elements in order	WD Delivered notification configuration
Standard Dashboards & Analytics	Workday delivers dashboards with worklets that are specific to them.	WD Delivered
Reporting	Reports delivered by Workday as part of their reporting library.	Standard Dashboards & Analytics 500+ Delivered Workday Reports
Data Conversion	Ties the employees to all functional area's configuration data	Scope is defined for each respective functional area below
Workday Today	Workday delivered home page including 4 standard cards.	WD Delivered

Workday Assistant	Delivered digital assistant help for end users within Workday.	WD Delivered
Funds	Funds are used to manage how clients consume their grants. Fund worktags identify the sources of funding when associated with spending activities on awards. These worktags are typically Federal, State, and Other.	Up to 150
Financial Custom Worktags		Up to 2

Core HCM Parameters

Human Capital Management (HCM)

Functional Area	Feature Definition	Scope Assumptions
Core HCM-Core Configuration	The Core HCM module includes the following features and functions: • HCM Basics • Basic Compensation • Set-up, manage, and report on contact information such as address, phone numbers, and email addresses • Set-up and manage compensation guidelines (grade, grade profiles, grade steps), compensation basis, and eligibility rules • Define job families, job profiles, job classifications, management levels, and other job-related setup data	Included

Functional Area	Feature Definition	Scope Assumptions
Organizations (Supervisory, Cost Center, Company, Region, Location) and Associated Hierarchies	**Supervisory** Organizations - group workers into a management hierarchy. **Cost Center** - used to group workers by related revenues and expenses. **Companies** - are the primary organization type used by Workday Financials. **Region** - Customer-specific regions reflect the area of responsibility for a worker instead of work location. **Location** - represents a work location that will include the physical address as well as additional details such as email and phone number(s).	Up to 1 Hierarchy per organization structure
Establishments	Establishments support compliance with local regulatory reporting by combining a worker's legal entity and location.	Included
Employee and Manager Self-Service	**ESS** – Phone, Address, Work, Email Data, DOB, Place of Birth, marital Status, Race Ethnicity, Citizenship **MSS** – Hire, Change Job, Compensation Transaction, Termination, and other processes that pertain to their direct reports	Included
Job Catalog	**Job Families & Job Family Groups** - help to organize and group job profiles, as well as allow you to use these groupings as criteria in condition rules or compensation eligibility rules. Job profiles can be added to a job family, and job families can be added to job family groups. **Job Profiles** - enable you to describe general characteristics of a position and identify special skills, training, or other qualifications. A job profile can be assigned to multiple positions or workers.	Up to 20 Job Family Groups Up to 50 Job Families Up to 300 Job Profiles

Functional Area	Feature Definition	Scope Assumptions
Position Management Staffing Model	Position management staffing model is used when a single position is created to be filled. To hire, promote, demote, contract or transfer into a position, there must be an approved and available position as of the worker's start date. Positions can open after a job change and can be moved from one supervisory organization to another as part of a job change. A position can be closed if it is no longer needed.	Up to 5,000 Positions for Active Workers
Shifts	Captures employees working within a different time during the day	Up to 5
Delivered Security Groups, Roles	The security group and role links the assignee allows an employee to view or view and modify access	WD Delivered
Management Types & Management Level Hierarchy	The management level hierarchy allows a customer to define the hierarchy of management levels such as manager, vice president, and so forth. Management levels can be used for reporting or in the creation of condition rules and business process workflow, as well as eligibility rules.	Up to 9 Management Type values in One Hierarchy
Personal Data, Contact Information, ID Information	Employee personal information	Included
Emergency Contact Information	Employee Emergency Contact	Included
Employee Photos	Pictures within WD	Included
Education	A library of schools, degrees, and fields of study can be set up in Workday, and workers and can use these to manage their education record on the worker profile. Educations can also be assigned on the job profile.	Included
Job History	Employee's job history in profile	Included
Language Tracking	Enables language proficiency level tracking for employees	Includes delivered languages, ability types and proficiency levels
Skills Cloud (with ISA Opt In)	Enables tracking of employee's skills leveraging skill cloud functionality with over 55k unique skills. Requires signing of Innovation Services agreement with Workday. *Setup by HCM if Talent Optimization is removed from scope.*	Enable Skill Cloud functionality, excludes setting up tenanted skills

Functional Area	Feature Definition	Scope Assumptions
Service Dates	Allow the customer to bridge the gaps between dates of employment	Included
Worker Types	Categorization of worker type for legal purposes	Included
Job Requisitions	Is a process used to request a hire	Included
Unions	Set-up of Unions that employees belong to	3 In Scope
Collective Agreements	Set up collective agreements as a stand-alone business process or as a sub process of the Change Job business process to specify how local labor laws apply to your business	2 In Scope
Multiple Jobs	An employee with a primary job or position can be assigned to another job or position.	In Scope
Basic Compensation Management	Functionality to support Grades, Grade Profile, Compensation Package, Hourly Plan, Salary Plan and Period Salary	WD Delivered
Compensation Package	A compensation package is a grouping of compensation guidelines (grades, grade profiles, and their associated steps) and plans that you can assign to workers as a set. Packages provide a quick view of the eligible plans for a particular job or group of employees.	Up to 2
Delivered Compensation Basis	A compensation basis groups compensation components to define estimated earnings for different employee populations.	WD Delivered
Salary Plan	Salary plans within Workday are assigned to eligible employees. For amount-based and unit-based plans, you can include or exclude the prorated compensation for employees assigned to a specific plan based on their full-time equivalent hours percentage (FTE %) as a default on the salary plan. Eligibility rules are created to determine which employees are eligible for the plan.	Up to 1
Hourly Plan	Hourly plans designate compensation for hourly employees. Eligibility rules are created to determine which employees are eligible for the plan.	Up to 1

Functional Area	Feature Definition	Scope Assumptions
Allowance Plans	Allowance plans are payments included as part of an employee's pay and could include something as common as car or cell phone allowances to vouchers for movie tickets. The allowance plan can be: • Amount based • Percent based • Unit based	Up to 20, excluding reimbursable allowance plans
One Time Payment Plans	Facilitate ad-hoc payments to your employees	Up to 5
Shell Commission Plan	A performance measure, such as sales or gross profits, to determine payout.	Up to 1
Period Salary Plan	A plan that enables you to assign extra months, weeks, or days of pay to employees	Up to 2
Compensation Statements	Wage Theft Prevention Notice: Written notice of wage rates to employees Total Rewards: Statement that displays a breakdown of base pay, bonuses, health and other benefits, stock, commissions, etc.	1 Delivered Wage Theft Notice and one additional configurable Wage Theft Notice 1 simple Total Rewards statement without Payroll results
Modifiable BPs	Use pre-configured BPs	• Hire Employee • Terminate Employee • Create and Edit Position • Change Job • Request One Time Payment • Request Compensation Change • Contract Contingent Worker • End Contingent Worker Contract • Propose Compensation Hire • Propose Compensation Change
Event Categories and Reasons	Reasons for transactional purposes that can be used for reporting	Included
Tenant Branding	Look and feel of Workday production tenant.	Up to 1 logo, 1 banner, and 1 mobile logo
Announcements	Communication on worker's home page.	Up to 1 for onboarding

Functional Area	Feature Definition	Scope Assumptions
Data Conversion	Process of applying all organizational, compensation, employee, financial and data configuration to an employee in order to populate the Workday tenant	• Up to 3,500 Workers Including Associated Personal Data • Up to 7,000 Terminated Workers (Using Former Worker Object) • Job and Compensation History - Unlimited "History from Previous System (Post-production) • Includes Loading of Employee Photos • No Transactional History • Attachment of Third-Party Documents out of Scope
Dashboards	A grouping of reports and information accessed on a single view.	Other standard dashboards as delivered by Workday

Onboarding

Functional Area	Feature Definition	Scope Assumptions
Onboarding Setup	Welcomes the new hire and provide them with Helpful Contacts and 'People to Meet' during their first day or week of employment	WD Delivered
Bulletin Worklet for Onboarding	Bulletin worklets deliver tailored messages to different groups of workers. Condition rules can be defined with each message to determine who receives the message.	Up to 10
Custom Onboarding Templates	Gives managers a starting point for engaging new hires onto their teams. You can create custom templates for different organizations or worker types and match them to new hires based on eligibility rules. You can then send them to managers so that they can customize the content in the From My Manager and Helpful Contacts worklets.	Up to 10
I-9 Functionality	The electronic Form I-9 is for newly hired and rehired employees who work in the U.S.	WD Delivered Functionality
Setup I-9	Create electronic Form I-9s for U.S. employment verification.	WD Delivered
Onboarding Dashboard	Configurable dashboard with new hire information	Included

Functional Area	Feature Definition	Scope Assumptions
Reporting		WD Delivered Reports
Modifiable BPs	Additional validation or condition rules added to multiple steps of a BP for routing purposes	• Onboarding (15 Documents in Review Step • Onboarding Setup
Data Conversion	N/A	Excluded from Scope

Benefits

Functional Area	Feature Definition	Scope Assumptions
Benefit Groups (Including Eligibility Rules)	Benefit Groups are used to define a population of workers who qualify for similar benefits plans, rates, and processing. Workday enables you to create benefit groups dynamically using eligibility rules to define membership criteria. The workers who meet the criteria specified in a Benefit Group eligibility rule are automatically assigned to that group. For instance, benefit groups can be created based on eligibility rules that assign executive management staff to one group, salaried employees to a second group, and hourly employees to a third group.	Up to 6 for active workers
Benefit Plans (including all components, such as eligibility rules, coverage tiers, and rates)	Benefits Plans define the coverage levels or amounts available to employees enrolling in an insurance, health care, defined contribution or spending account plan. Benefit Plan also identifies the populations (e.g., employee, employee + spouse, employee + children, etc.) eligible for benefits. Finally, it provides restrictions on the age(s) of the covered dependent(s) as well as plan rates and costs.	Up to 50 plans Retirement Savings Plans - Only for outbound CCB demographic data and/or inbound Elections
Benefit Eligibility rules	Create the condition rules that Workday uses to identify an employee's eligibility for a benefit group, or plan, or dependent's eligibility for benefits.	Included Rules based on custom Id's, custom fields or hours worked excluded
Retiree Benefits	Ability to maintain benefit entitlement and eligible for employees who have retired from the organization. A benefit group and the benefit plans dedicated to managing retirees and/or their surviving spouse.	Included with up to 5 benefit plans and 1 retiree benefit group

Functional Area	Feature Definition	Scope Assumptions
Medicare Tracking/Split Dependents	Tracking Medicare coverage and enrollment information for employees, retirees or eligible dependents to coordinate benefits based on Medicare coverage to determine the primary and secondary payer on medical expenses	Included
Reinstatement Events	An event in the employee's life that gives the employee the opportunity to change benefit elections due to a return from leave or rehire. This configuration can allow rehires/returnees from leave to default into their previously elected benefits.	Out of Scope
Passive Events	Passive Events are used to identify employees, or an employee's dependents, which are either gaining or losing benefit plan eligibility because of the passage of time. You can configure whatever passive events to suit your business needs for the milestones that occur.	Up to 3
Enrollment Event Types	An event in the employee's life that gives the employee the opportunity to change benefit elections. These include staffing changes (such as getting hired or promoted) as well as life events such as marriage and childbirth.	Manage Benefit Enrollments Due to Eligibility Changes and Life Events. Pre-configured Staffing Events and Section 125 core events Up to 4 additional events
Enrollment Event Rule	Enrollment Event Rules are rules that determine how different benefit groups will receive their benefits based on a number of factors including coverage begin/end dates, maximum coverage level or amount increases, waiting periods, evidence of insurability requirements and other differentiating features and conditions of enrollment events among benefits groups. An Enrollment event is any event that results in a gain or loss of benefits coverage. This covers both open enrollment and benefit events such as a new hire and termination.	One Pre-Configured Enrollment rule for Sec 125 events. Client input limited to coverage begin, coverage end, deduction begin, deduction end, and EOI Rules.
Benefit Defaults	Workers may be defaulted into a plan or plans during a benefit event if no active elections are made.	Out of Scope
Manage COBRA Eligibility	COBRA records can be created for eligible workers and dependents based on configured reasons. These records can be passed to the COBRA provider via integration.	Designations for Participants Who Lose Coverage
Manage Evidence of Insurability	Evidence of Insurability records can be created during applicable benefit events based on	Included

Functional Area	Feature Definition	Scope Assumptions
	configured rules. Benefit Administrators can use a delivered report to track and eventually approve or deny employees pending EOI approval.	
Cross Plan Enrollment Rules	Coverage options available to workers during an enrollment event based on their choice of other benefit plans and coverage amounts. For example, you can limit coverage in a specific plan to a percentage of the total coverage in one or more other benefit plan	Up to 5
Derived Coverage Targets	Coverage targets are automatically determined based on the selected covered dependents during an enrollment.	Included
Individual Rates	Individual Rates are included when rates cannot be calculated via a rate table for each individual, and separate rates must be loaded in for each worker's plan cost(s).	Out of Scope
Benefit Annual Rates	Annual amount of compensation for insurance plan calculations	Out of Scope
Open Enrollment	Benefits enrollment process for employees	Up to 1 Open Enrollment event configured and tested
Enrollment Instructions	Instructions on each page of the enrollment screens to provide worker with additional pertinent information	Included
Core ACA Functionality: ACA Measurement Periods and Eligibility, ACA Dashboard, Setup for 1094-C and 1095-C Reports	ACA eligibility and processing For new hires, Workday uses passive events to determine eligibility for benefits according to the Affordable Care Act standards. Passive events, using the ACA Measurement Period Eligibility Rule type, determine: • Whether a measurement period must be recorded. • Whether a worker's hours during a measurement period make the worker full-time. The result is defined in the Qualified As ACA Full-time field. Next, the condition rule called If there is an effect on employee benefits? Determines whether a benefit event is created. For ongoing workers, Workday uses open enrollment to determine eligibility for variable hour, part-time employees. When you add the Qualified As ACA Full-time field to eligibility rules for the benefit group and plan,	Included Stability Period = 1 Calendar Year aligned with Open Enrollment

Functional Area	Feature Definition	Scope Assumptions
	those workers are now considered for open enrollment	
Modifiable BPs	Use pre-configured BPs Can add up to 3 steps to the Change Benefits for Life Events BP	• Change Benefits for Life Events • Dependent Event • Change Benefits • Passive Event
Data Conversion	Conversions resources will load Current Benefit Elections, Dependents & Beneficiaries, and Medical History for Current Year for ACA Reporting into testing and production environments. If applicable, Benefit Annual Rates will be loaded. ACA Worker Hours and Wages will be loaded for a maximum of one benefit group and 2 historical medical plans, 1 self-funded & 1 fully insured	• Current Benefit Elections • Dependents & Beneficiaries • Medical History for Current Year for ACA Reporting • Benefit Annual Rates • ACA Worker Hours and Wages (ACA historical Setup assumptions - 1 group and 2 plans, 1 self-funded & 1 fully insured)

Absence Management

Functional Area	Feature Definition	Scope Assumptions
Time Off Plans	Track short term time away from work (i.e., Vacation, PTO, and Personal). Non-Accruing Plans: Non-balance tracking plans, zero accruing plans for balance loading/overrides only, no calculated accruals. Accruing Plans: configured accrual calculations and balance tracking	Up to 15 total Time Off Plans (10 Non-Accruing Plans, 5 Accruing Plans) WD Delivered for Days to Include, Balance Periods, Daily Quantity defaults, Lower Limits, Upper Limits, Carryover Limits/Expiration. Excludes Absence Tables; Multi-Year Upper Limit Expirations; Dynamic Calculations
Time Offs	Time off attributes tied to time off plans	5 Time Offs per Accruing Plans 3 Time Off per Non-Accruing Plans WD Delivered time off entry validations and validation messages

Functional Area	Feature Definition	Scope Assumptions
Accruals	Calculated accruals for balance tracking time off plans. Low complexity prorations included (days in period, claw back configuration)	5 per Accruing Plans 3 per Non-Accruing Plans WD Delivered prorations and scheduling
Related Calculations	Calculations used by the Absence Calculation Engine to return values.	Included
Holiday Calendar	Statutory/Company Holiday Calendars	Up to 12
Holiday Calendar Rules	Eligibility rules for each holiday calendar	Up to 3 per Holiday Calendar
Work Schedule Calendars	Specify the days workers are scheduled to work and the start of the work week	Up to 5, with 3 patterns per work schedule
Work Schedule Rules	Eligibility rules for each work schedule calendar	Up to 2 per Work Schedule
Leaves	Leave plans to track long term time away from work (i.e., Short Term Disability, Long Term Disability, Sabbatical) Basic Leave types for tracking leave of absence events. Basic leave does not have entitlement calculations and is used to track leave type, status, and dates only. Non-Entitlement: configure leave type, leave impacts, leave eligibility only; no calculated entitlements Advanced leave types for tracking leave of absence events. Entitlement: configure basic setup, plus configure entitlement calculations for leave balance tracking, leave additional fields, leave reasons	Up to 10 • Up to 5 Basic Leaves (non-entitlement tracking) • Up to 5 Advanced Leaves (entitlement tracking) WD Delivered validations and supporting data. Excludes Cascading Leave of Absence and Absence Case Events.
Leave Segment Security	Parameters to allow for Leave of Absence security segments	Use Strada Delivered Configuration for ESS, MSS, Partner/Admin
Custom Security	Configuration of Intersection Security for Absence Management	Up to 2 custom security groups to support Employee Self Service and Manager Self Service to restrict Absence to eligible populations only

Functional Area	Feature Definition	Scope Assumptions
Absence Setup	Absence Type Groups act as “folders” and help the user navigate to the appropriate leave or time off plan when requesting. Team Absence is the absence calendar display for managers and their direct reports, as well as employee as self and their coworkers. Absence Manager Dashboard	Strada Delivered Configuration for Absence Type Groups: 3 total • 1 for Time Off, 1 for Leave of Absence, 1 for Do Not Request (termination payout/adjustment time offs) WD Delivered Dashboards and worklets Team Absence: • Strada Delivered Configuration; 1 maximum setup for each of the following: manager self-service, employee self-service
Unions	Track and report on union membership for workers	Up to 3
Multiple Jobs	An employee with a primary job or position can be assigned to another job or position. This allows reporting of multiple jobs with impacts to absence accruals.	Included
Workday Assistant	Workday Assistant for ESS Time Offs	Included with WD Delivered functionality
Modifiable BPS	WD Delivered Can add/edit up to 2 steps per process unless otherwise indicated	• Absence Calendar – initiation step only • Correct Time Off • Request Time Off • Assign Work Schedule • Request Leave of Absence • Request Return Leave of Absence • WD Delivered Business Process Notifications

Functional Area	Feature Definition	Scope Assumptions
Data Conversion	Process of loading Time Off Balances and Leave history into the tenant.	• Time off Balance Conversion Included • Active Leaves for the Previous 12 Months • Time Off Event Conversions Excluded

Payroll

Functional Area	Feature Definition	Scope Assumptions
Pay Components (Earnings and Deductions)	Earnings and deductions, also known as pay components, are the fundamental building blocks of payroll calculations. Complex earning calculations are defined as anything OUTSIDE the following list: Salary earnings code where rate is pulled from comp, Hours * rate where rate is pulled from comp, group term life imputed income pulling the taxable amount from benefits, and simple pay input where the client calculates the amount of the earning outside of the system and loads it thru EIB or the UI.	Up to 175 earnings and deductions No more than 15 complex earning calculations
Pay Accumulations, Pay Balances, Pay Component Groups	**Pay Accumulations -** A pay accumulation is a set of earnings, deductions, pay component-related calculations, pay component groups, or other pay accumulations for which Workday can calculate a total. You specify which values to add or subtract. **Pay Balances -** Over a balance period that includes multiple gross-to-net results (such as quarter-to-date, year-to-date, or fiscal periods), you can set up pay balances to calculate a combination of: • Earnings • Deductions • Pay-component-related calculations • Pay component groups • Pay accumulations **Pay Component Groups -** These are added to the Earning and Deductions codes in order to accumulate the right amounts on the run categories when running pay calculation. For example, the PCG “Adds to Gross” is added to earnings such as Hourly Pay, Salary Pay,	Up to 20 pay accumulators, pay balances, custom pay component groups. Up to 2 custom balance periods

Functional Area	Feature Definition	Scope Assumptions
	Holiday Pay, etc. and is also added to the run category pay accumulation "Gross." Anytime a pay calc is run, everything that "Adds to Gross" is calculated, as well as the other PCGs tied to the run category.	
Net Pay Validation and Arrears	Net pay validation and arrears tracking and recouping rules in the event of a negative net pay scenario.	Included. All employees follow same arrear rules
Retro Processing	Use Strada POV for supported events	Included, use Strada POV for supported events
Off-Cycle Payments	Off-cycle payment transactions occur outside of a regularly scheduled (on-cycle) pay run and include: • Manual payments made to employees outside of Workday Payroll, such as check or cash. • On-demand payments that replace or add to an employee's on-cycle payments. • Reversals that back out of an employee's completed pay calculation.	Up to 5 Reason Codes
Payroll Involuntary Withholding Orders and Deduction Recipients	Workday provides rules for processing these types of income withholding orders: • Bankruptcy • Creditor Garnishments • Federal Administrative Wage Garnishments • Federal Student Loans • Federal Tax levies • State tax Levies • Support (including Lump Sum) • Wage Assignments Workday also supports these types of income withholding orders issued by Puerto Rico when the employee works in a state other than Puerto Rico: • Creditor Garnishments • Support Orders Based on state and federal law, Workday: • Determines the amount to withhold from the employee's disposable earnings, including arrears and any agency and employer fees. • Applies withholding limits and sets garnishment priorities. • Follows statutory rules to determine what to withhold for each order when: o An employee has multiple orders. o The amount to withhold exceeds the limit.	WD Delivered configuration, with noted conversion limitations

Functional Area	Feature Definition	Scope Assumptions
	Deduction Recipients - Record information for a third-party deduction recipient, including the: • Recipient. • Contact information. • Method of payment. • Bank account details.	
Pay Groups		Up to 2
Pay Run Categories		Up to 1, which includes “Regular”
Period Schedules for Payroll	Indicates processing frequency (monthly, biweekly, semi-monthly, etc.), period start and end dates, payment dates, and forward accruals. The period schedule is assigned to the pay group (like the run category).	Up to 2
Shift Differential Calculation	Shift Differential Calculation tags time blocks between certain hours so that you can pay in/out workers a shift differential.	Up to 5
Fiscal Posting Intervals, Schedules, Summary Schedules, Fiscal Years	The payroll accounting elements required to pass payroll expenses to Workday Financial Management, including accounts, account posting rules, fiscal schedules, and ledger types.	Up to 1 per each payroll, shared by all Companies; calendar year only
Journal Sources, Ledger, Ledger Types, Account Sets, Account Posting Rules	The payroll accounting elements required to pass payroll expenses to Workday Financial Management, including accounts, account posting rules, fiscal schedules, and ledger types.	Up to 1 shared by all Companies. Account posting rules up to 1 Dimension
Labor Costing	Specify how to allocate employee earnings and employer-paid expenses to the organizations and locations you define. Workday represents organization types and locations as worktag types (also called dimensions).	Simple Worker Costing Allocations Up to 1 Dimension (Up to 3 Dimension)
Payroll Tax Filing Configuration	Workday can send periodic, quarterly, and annual tax information from Workday Payroll to a third-party service provider using a tax filing integration. Payroll tax for Federal/State/Local Jurisdictions will need to be configured during implementation then maintained by Payroll or Tax administrator.	Included, leverage WD Delivered standard configuration

Functional Area	Feature Definition	Scope Assumptions
Companies	The primary organization type for Workday Financial Management. All financial transactions are for a company, and most financial reports are run in the context of a company, such as balance sheets and income statements. Workday recommends that you create a separate company for each internal entity with a separate tax ID.	Up to 2 Unique EIN for payroll
Financial Institutions		Up to 2
Bank Accounts	Define the business entities that provide company financial and banking services and have bank accounts, define branches of a financial institution, establish standard bank accounts at a financial institution, and establish petty cash accounts.	Up to 2
Routing Rules	Bank routing rules determine the bank accounts the settlement process uses to route payments that you initiate in Workday. These rules apply only to payments involving standard bank accounts, and not petty cash accounts.	Up to 2
Check Layouts and Payslip	Workday delivers 3 business form layouts for checks and advices. Each layout contains a metadata XSL style sheet that defines the default placement of fields, company logo, and signature on checks and advices. To customize the default configuration, you can create XSLT check print layouts. The layout that Workday uses at print time depends on whether the printout is a: • Financial check. • Payroll check. • Payslip If you use the default business form layout configuration rather than define your own check print layouts, use preprinted check stock. To use blank check stock, use check print layouts to configure the additional fields.	Up to 1- WD Default *(The expectation is the Workday paycheck will work as delivered. If any changes are needed a CO will be required.)*
Sample Check Images	The image that is displayed when the employee sets up a new banking account. Allows employee to understand where routing and account number can be found on check.	Up to 1
Payment Election Rules	Workday allows payment election rules to define choices for receiving and making	Up to 1

Functional Area	Feature Definition	Scope Assumptions
	payments, such as: • Methods of payment: check, direct deposit, or manual. • Number of allowed payment methods. • Number of allowed payment split distributions.	
Pay Group Automatic Assignment Rules	Rules to propose a default pay group for worker when assigning a pay group	Up to 2
Audit Report configuration	Workday allows you to set up exception audit reports to display exceptions on Workday delivered reports. Also, you can set up audit reports that compare results across periods, flagging exceptions for further investigation.	WD Delivered Use Strada Delivered Configuration for Audit configuration
Company Federal, State and Local Payroll Tax Reporting	Workday Periodic, QTD, and Year End reporting can be viewed for Federal, State, and Local taxes via the delivered Tax Filing reports	WD Delivered
Payroll Reporting Codes	Reporting Codes capture Geographic Code, Occupational Code, Branch Code, Location Code, Unit Number, Multi-Unit Number, Unit Code, or Unit Number to be reported for various states on the QTD tax file.	Included, leverage WD Delivered Configuration
W-2 Configuration	Workday provides default W-2 form configuration and a View W-2 Box Configuration report that payroll administrators can use to view and edit the W-2 form configuration for year-end processing. Boxes that are not populated by default will need to be populated by the Payroll Administrator or Partner (earnings, deductions, and pay component-related calculations to calculate and display).	Includes W-2 mapping only, leverage Strada Delivered Configuration
FLSA Work Period Calendar Rules	When you process payroll, Workday follows the FLSA work period calendar rules to assign workers to the associated FLSA work period calendars and calculates their FLSA earnings based on those work periods	Leverage Strada Delivered Configuration
Tax Integrations	Workday can send periodic, quarterly, and annual tax information from Workday Payroll to a third-party service provider using a tax filing integration. Payroll tax for Federal/State/Local Jurisdictions will need to be configured during implementation then maintained by Payroll or Tax administrator. This does not include the actual coding of the	Included Functional setup to support US Tax Integrations, for US Payroll Only.

Functional Area	Feature Definition	Scope Assumptions
	integration. See integration section for scope details.	
Tenant Setup - Payroll	Manage tenant-wide settings for Workday Payroll in these areas: • Proration Settings • Costing Allocations • Payroll Accounting • Payroll Commitments • Payslips • W-2/W-2C Form Alignment Override • US Year End Tax Documents Electronic Signature Text • ID Sequence Generators • Administrator Results	WD Delivered
Tenant Setup - Worklets	You can display reports as worklets on Workday landing pages or in dashboards. Worklets provide quick access to frequently referenced data and tasks common to a specific functional area. There are 2 types of worklets: • Custom worklets. You can create advanced, matrix, nBox, transposed, trending, or composite custom reports, and then enable them as worklets. • Workday-delivered worklets. You can't copy or modify Workday-delivered worklets.	WD Delivered
Payroll Compliance Updates Dashboard	The Payroll Compliance dashboard gives you quick visual insight into the compliance updates that are most important to you. You can quickly identify whether a compliance update potentially impacts your employees and take appropriate action, such as alerting employees, spot-checking payroll results, or being ready to answer questions. Its drillable worklets enable you to understand the details of what is changing without guesswork or the need to run weekly reports with various criteria. Can be configured to display 3 worklets: • Delivered Last Week • Effective Next Month with Employee Impact • Other Updates Delivered Last Week or Effective Next Month	WD Delivered
Union		Up to 3

Functional Area	Feature Definition	Scope Assumptions
Multiple Jobs	An employee with a primary job or position can be assigned to another job or position. The additional job can have a different supervisory organization, compensation rate, pay rate, scheduled hours, location, or job profile. Employees can have a number of additional jobs. Contingent workers can't have additional jobs.	In Scope
Effort Certification	Enables you to validate payroll effort expenditures with funding organizations and confirm that you are billing them correctly.	In Scope
EIBs for Payroll (Period Schedule, Off-cycle, Payroll Input)	Enterprise Interface Builder - An integration tool that enables you to create simple, secure, and customizable integrations with Workday. Alternately, an EIB is a simple integration created by the integration tool. An EIB consists of an integration system, an integration data source, an integration transformation, and an integration transport protocol.	WD Delivered
Modifiable BPs	WD Delivered Can add/edit up to 2 steps per process	• Settlement Run Event • Payment Release Event • Assign Pay Group • Complete Federal Withholding Elections • Complete State and Local Withholding Elections • Payment Election Enrollment Event • Payment Printing Event • Print Checks Task • WD Delivered and Strada POV Business Process Notifications
Data Conversion		• Up to 3 test and production loads for quarter-end, go- live • Payroll Balances for Current Year (if go live is on a quarter) • Worker Payment Elections • Worker Tax Elections

Time Tracking

Functional Area	Feature Definition	Scope Assumptions
Groups for Time Tracking	Identifies the time entry codes for which workers are eligible. (Example - Unions, Collective Bargain, Hourly, Salaried, Salaried Non-Exempt, Non-Exempt, etc.).	Up to 4 Time Code Groups WD Delivered eligibility rules
Time Entry Codes	Types of time that workers can enter	Up to 30 WD Delivered rounding
Time Calculations	Generate categories of payable time by applying calculation tags such as overtime and double time to a worker's hours.	Up to 50 Excludes time calculations based on custom objects, time off plans, benefits eligibility, and tardiness/attendance, time dockage, rolling/request OT calculations
Time Calculation Groups	Specify worker eligibility for time calculations	Up to 4 WD Delivered eligibility rules
Time Entry Templates	Controls the appearance of a worker's time entry calendar. It identifies the default time entry code to associate with reported time, valid worktags for time entries, and various time entry options.	Up to 10 WD Delivered Shifts
Time Validations Rules	Used to alert or prevent workers from entering or submitting invalid time entries. Can be defined as errors or warnings.	Up to 5 Time Entry Validations WD Delivered
Shift based calculations	A time shift is a grouping of consecutive blocks that apply to workers who report In and Out times. Time shifts enable you to base calculations and validations on a worker's entire shift, whether or not the shift is fully contained within the worker's defined workday.	Up to 5
Work Schedule Calendars	Determine the days and hours of the work week on the Time Entry calendar.	Up to 20, with up to 4 patterns per work schedule
Worktags	Capture information about a worker's hours for costing and other purposes (i.e., cost center, project).	WD Delivered, including one custom worktag
Security Groups to Support Employee Self Service and Manager Self Service	Intersection security to control Time Tracking access	Up to 2 to restrict Time Tracking to eligible populations only
Specific Reports & Calculated fields	Workday custom report prioritized by client	10 Custom Reports from Strada Delivered Configuration
Alerts & Reports	Alerts for Time Tracking Reports	Up to 3 (1 alert per Strada Delivered report)

Time Tracking Period Schedules	The time period schedule, in combination with the pay period schedule, determines when employees receive pay for time worked. It defines the dates that are open for time entry, lock dates to prevent employees from entering time while payroll is being processed, and which time entries (dates) to load for a pay period.	Up to 3
Submit Text	Message displayed when a worker submits their time.	1 Submit Text
Time Clock Device Integration	Integration with a third-party vendor(s) to capture hours from time clocks (non-web based).	Up to 2 non-Workday Partner integrations
Multiple Jobs	An employee with a primary job or position can be assigned to another job or position.	Included
Union	Time tracking requirements to cover unique union/CBAs time entry policies.	Up to 3
Time Tracking Setup	Review Time is a report managers can use to review time tracking hours for the week. Time Tracking Manager Dashboard	WD Delivered dashboards and worklets Review Time • 1 delivered totals setup • Strada Delivered Configuration; Enable: Include Warning Indicators, Include Count of Incomplete Time Entries, Include Scheduled Weekly Hours Time Tracking Manager Dashboard: • Team Time is the manager dashboard for when only Time Tracking is Included. If absence management is also Included, Time & Absence Dashboard will be utilized instead.
Modifiable BPs	WD Delivered Can add up to 2 steps per process.	• Assign Work Schedule • Enter Time • Reported Time Batch Event WD Delivered Business Process Notifications
Data Conversion	Not Applicable	No Data Conversion included

Time Tracking for Projects

Functional Area	Feature Definition	Scope Assumptions
Projects Tracking	Project tracking functionality available within the Time Tracking SKU	In Scope
Time Tracking Data Conversion	Projects	In Scope

Recruiting

Functional Area	Feature Definition	Scope Assumptions
Candidate Home	External Candidate will apply to an open position through the candidate home	Included
Prospect Management	Someone who has not applied to a position, but you are following to possibly bring onto your team	Included
Internal and External Career Sites	Workday provides the ability for you to create external career sites that enable: • You to publish and market job postings on dedicated and branded career sites. • Candidates to search for job posting opportunities and apply on an intuitive and responsive website. When you create an external career site, Workday automatically provides the ability for candidates to register for an account based on their name and email address. When a candidate applies to a job, this enables you to communicate with a candidate during any stage of the recruiting process. You can send them a request to: • Complete a questionnaire. • Review documents and electronically sign them. • Provide their government or national IDs. • Provide additional personal information. The one account works on all your external career sites.	1 Internal Career Site for Employees, 1 Internal Career Site for Contingent Workers, and 1 External Career Site
Internal and External Questionnaires	You can configure Workday to have: • An external or internal candidate complete up to 2 questionnaires when they apply for job from an external or internal career site. • An external candidate with a registered Candidate Home account or internal candidate completes one or more questionnaires at any stage in the recruiting process.	2 Internal and 2 External Questionnaires, one questionnaire per job requisition with no more than 25 questions, English only
Internal Application	Current worker application process	Up to 1
Recruiting Standard Reports	Recruiting reports	WD Delivered
Simple Referral Plan	Referring a candidate	Up to 1
Auto Unpost Jobs	Un-posting a position from the candidate site	Included
Assessments	Possible Logic or system test for the candidate	Included

Auto Disposition Candidate's Other Job Applications	Removing candidate from consideration from other jobs they have applied too	Included
Background Check	Checking candidates previous work and criminal history	Up to 5 Packages and Up to 3 Statuses
Duplicate Management	Merging of multiple applications for the same candidate	Included
Interview Management	Have the entire recruitment team provide feedback on the candidate	Included
Job Requisition Categories and Reason	Reason for creating a job requisition	Included
Interview Ratings	Rating candidate after the interview	Included
Primary Recruiter Security	Ability to view and modify non WD delivered data	Included
Candidate Screening	Initial contact to ensure the candidate is still interested in the job	Included
Candidate Grid	Way to manage your candidate through the recruitment process. Adjusts the look and feel of the page the recruiter reviews.	Included with a maximum of 5 calculated fields
Candidate Review	Provides you with the opportunity to move the candidate to the next phase recruitment process	Included
Evergreen Requisition Management	Specific Job Application for high volume positions always open	Included
Job Requisition Management	Job requisitions are the basis for job postings in Workday Recruiting. You must complete specific recruiting-related requirements so candidates can submit applications to your job postings. Use the Manage Job Requisitions report to view all open, pending approval, on hold, and closed job requisitions. Details include job requisition and candidate information. Also, included are the days the requisition has been open, the requested completion date, the close date, and last recruiting stage	WD Delivered
Offer Letter	You can create offer letter templates that you can customize and use to dynamically generate documents such as employment agreements and offer letters.	Up to 1, English only with a maximum of 10 calculated fields and 10 rules
One Time Payment for Offers	Ability to generate a request for a One Time Payment as part of the Offer process.	Included
Candidate Endorsement	It enables employees to endorse a candidate's application	Included
Candidate Pools	Enable functionality to group candidates.	Up to 2

Recruiting (Core Configuration)		1 consistent candidate & hiring process & approval routing across all business units, geographies, departments,
Modifiable BPs	Editing all Recruiting BP's	• Job Application (1 Dynamic Workflow) • Job Requisition • Offer
Data Conversion	Previous system data conversion	Open Job Requisitions and Corresponding Open Positions **Excluded Items:** • Prospect Conversion • Open Positions Not Associated with Job Requisitions • Active Candidate Data Conversion • Attachments

Candidate Engagement

Functional Area	Feature Definition	Scope Assumptions
Setup	Turn on functionality for Candidate Engagement Hub. Educate customer on best practices for setup of Landing Page, Recruiting Campaign and Analytics.	Included

Messaging

Functional Area	Feature Definition	Scope Assumptions
Prerequisite	Production tenant available and customer is Live on the HCM SKU Innovation Services Agreement	Customer-owned
Message templates	Modify existing Message Templates to allow SMS setup	Customer-owned
Custom Notifications	Modify existing Custom Notifications to allow SMS setup	Customer-owned
Reports	Workday Delivered	Included
Data Conversion		Not applicable

Learning

Functional Area	Feature Definition	Scope Assumptions
Learning: Core Configuration	Setup Learning Domains, Configuration of Business Processes, Security Roles, Topics, Learning Dashboard, Activity Stream	Included
Learning Campaigns	You can create campaigns that engage workers in learning activities by promoting course and lesson content to target audiences.	Up to 8 single object campaigns
Learning Programs	Groups learning courses and lessons into a structured curriculum. Review/design use-cases as examples on how to build	Out of Scope
Audience	Used in campaigns and scheduled distributions. When a user meets the audience requirements for an active campaign or scheduled distribution, Workday sends the notifications according to the defined schedule.	Up to 8
Topics	Topics enable you to categorize courses and stand-alone lessons, improving the learning catalog search and browsing experience for learners.	Up to 10 topics with customs images
Learning Prerequisites	Prerequisites enable you to enforce certain courses being taken prior to others	Included
Learning Equivalencies	Equivalencies can be created as a 1:1 or 1: Many rule and can enable employees to find similar content in the catalogue, as well as recognize completion of courses via completion of an equivalent.	Included
Learning Validations	Learning validations enable you to create critical stops or soft warnings upon the initiation of Enroll in Course and Drop Learning Enrollment business process	Up to 2
Learning Message Templates	Message templates are used to deliver consistent messages to your audiences such as reminders related to upcoming due dates.	Up to 1
Learning Training Room Creation	Training Rooms can be created as subordinate locations to existing HCM business sites. These would be rooms in which offerings may be scheduled within business sites.	Up to 20
Configurable Security	Custom segmented security groups to control access to course content. Does not include custom user based or role based or intersection security groups.	Up to 4
Mobile	Enable Packaged Content on Mobile	Included
User Generated Content	Add Employee as Self and/or Contingent Worker as Self on the Manage Lesson business process policy.	Included

Reporting	Workday offers many reports that allow you to summarize information that is contained in the system.	WD Delivered
Data Conversion	Conversion of Instructors, Assessors, Digital or Packaged content, Historical Transcripts and Course Catalog: Build out of catalog learning objects which could include: • Stand-alone Lesson • Instructor Led Training (ILT) Course • Instructor Led Training (Web) Course • Training Activities • Digital Course: Media • Digital Course: Survey • Digital Course: External Content • Offerings • Learning Programs	Customer owned, Strada provides EIB Knowledge Transfer and oversight

Talent Optimization

Functional Area	Feature Definition	Scope Assumptions
Mentor	Employees can establish mentoring relationships	Includes delivered mentor types and close mentorship reasons.
Interests	Employee can designate career interests, Relocation Preferences, Job Interests and Travel Preferences	Includes delivered values for career interests, job interests, relocation areas and travel amounts.
Development Items	Development Items allow workers to track career objectives that are not rated during performance events.	Includes delivered development item categories and completion statuses.
Anytime Feedback	Allow feedback to be given or requested, named or anonymous in free-form at any time	Included
Performance Review Templates	Performance Review Templates include configurable sections for self-evaluations by employees, and evaluations by managers and additional reviewers. Rating scales can be added to these templates.	Up to 3 performance review templates. Performance Reviews will have an option of 3 sections: Goals, Competencies and Overall. One rating scale 5 points or less.

Functional Area	Feature Definition	Scope Assumptions
Check-Ins	Allows Managers and Employees to document 1:1 sessions.	Included
Goals	Goals are guiding principles or values that you would like your business or organization to achieve throughout a given period of time and assessed as part of the performance review.	Goal attributes include: description, category, status, and due date. Includes delivered values for status.
Competencies	A set of defined behaviors that provide a structured guide, enabling the identification, evaluation, and development of the behaviors in individual employees. In Workday, worker competencies are rated as part of performance.	Up to 10 competencies that can be mapped to management levels
Modifiable BPs	Use pre-configured BPs Can add up to 3 steps to BPs Can add up to 5 custom notifications across BPs	• Manage Interests • Give Feedback • Manage Goals • Start Performance Review • Complete Self Evaluation for Performance Review • Complete Manager Evaluation for Performance Review
Succession Planning (for Position Management)	Identify critical roles for succession, create plans and assess readiness on candidates.	Up to 50 Positions for Succession: includes delivered values for readiness
Assess My Team's Potential	Managers and other support roles can assess an employee's potential and retention risk by a supervisory organization.	Includes delivered values for potential and retention risk.
Assess Potential	Managers and other support roles can assess employees' potential, retention risk, loss impact, and achievable level	Included
Modifiable BPs	Use pre-configured BPs Up to 2 custom notifications across BPs.	• Manage Succession Plan • Assess My Team's Potential • Assess Potential
Data Conversion	Historical changes to goals, performance reviews, potential, succession, and other talent/performance history	Out of Scope

People Experience – Journey

Feature	Feature Definition	Scope Assumptions
Core Build	**Core Journeys Configuration** Enable PEX and Journey functional areas, configure Journey WD delivered security groups, Journey domains, business process policies, and Journey workspaces. Configuration of Journey business process and updates to HCM business processes for Journey distribution service where applicable. Introduce Journey distribution options.	Delivered
Prerequisite	Customer activity	Client signed Innovation Services Agreement (ISA) Media Cloud Agreement – necessary for videos
Journey Setup		Mass Operation Management preparation, including 1 audience custom report
Journey Path	Transition to New Manager Journey	WD delivered
Journey Builders	Journey builders contain the step groups and associated condition rules to drive providing content for different populations.	Up to 3 Journey Builders deployed to all populations
	Step groups define the various steps within a journey. Steps can include Workday tasks, links, video, text and knowledge base articles (if Workday Help is deployed).	For each Journey Builder, up to 4 Journey Step Groups with up to 10 Steps per Group
Modifiable BP		Business Process Action Step configuration up to 3 for business processes using Journeys
		Journey Distribution Business Process (ad hoc distribution)
Data Conversion		Not Applicable

People Experience – Help

Feature	**Feature Definition**	**Scope Assumptions**
Prerequisite	Customer activity	Client signed Innovation Services Agreement (ISA)

Setup	**Case types** define the various types of cases that a user can submit. Case types are used to drive case suggestions, reporting and case routing. Case Types deployed to all populations that will use the Help case management functionality.	Up to 5
	Questionnaire allows development of relevant questions during the creation of a case and soliciting feedback from case creator after case resolutions. This includes a maximum of 3 questions per questionnaire and no branching questions. Note, the same questionnaire can be used on multiple case types.	Up to 2
Service Teams	**Service Teams** - group the receives the cases for the associated case types. Service Teams drive SLA calculations and Strada will align SLA to the Service Teams per business requirements.	Up to 5
	SLA - defined per service team. SLA metrics are time to respond and time to resolve.	Workday Delivered
	Ability to enable **confidential cases** by case type and delineate case solver security to a smaller population.	Workday Delivered
Knowledge Base	**Knowledge Base Audiences** - Provide contextual security to knowledge base articles, includes creation of one segment-based security group per audience.	Up to 5
	Knowledge Base Categories - Provides groupings of Knowledge Base articles for reporting purposes	Up to 20
	Knowledge Base Article - Content and article creation owned by client post go live.	Up to 1 configured by Strada to support case creation help text. Additional Knowledge Base Article creation is customer owned.
	Audience Rule - Rule to determine which population (Audience) would receive the Knowledge article.	Workday Delivered
Reporting	Reports to display on the delivered Help Dashboard	Workday Delivered
Modifiable BPs	1 feedback questionnaire used for all in-scope populations on the Resolve Case business process - No extra to-dos, steps, or notifications	Workday Delivered
Data Conversion	Data Conversion	No Migration of Historical Cases or Knowledge Management

Core Financials Parameters

Financial Accounting

Functional Area	Feature Definition	Scope Assumptions
Core Financial System of Record	Primary operational financial system	Included
Fiscal Schedule	Fiscal Schedule to be set up in tenant	Up to 1 Fiscal Schedule
Fiscal Schedule Summaries	Fiscal Schedule to be set up in tenant	Monthly, Quarterly and Annual
Accounting Adjustment	Change Reason codes to reclassify specific accounting transactions	Included
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10
Allocations	Allocation of costs across other cost centers. Examples of allocated costs: IT, space expense by headcount or sq ft, marketing and other overhead costs. If an allocation is dependent on another allocation to calculate and process, then each allocation would be counted toward the total.	Up to 25
Statistics	Statistics used as the basis for allocations, as well as for reporting based on the Statistics or Statistic Lines report data sources.	Up to 20
Average Daily Balance Rule	Ledger accounts and associated worktags that the client wants to include in average daily balance calculations	Included
Allocation Group Sets	For processing Allocations, group related allocation definitions into allocation group sets	Up to 1
Ledgers	Workday has three ledgers that can be configured: Actuals Encumbrance Pre-encumbrance No customizations	Included
Currency Translation	Account translation methods to determine how you want to calculate fiscal year beginning balance and activity	Included

Year End Closing Rules	Define rules that map source accounts to target accounts at year-end. Rules are applied when you roll forward account balances and close ledger years. If no rule is specified, Workday, by default, rolls account balances forward to the same account during roll-forward and year-close processing.	Included
Currency Rate Types		WD Delivered (only)
Capital Assets - Work in Progress	Work in progress assets (or assets under construction) for assets as they relate to a capital project.	Included
Import Journals via Spreadsheet	Delivered EIB's	Delivered
Consolidation	Automated elimination process The process of combining financial data from different departments, business units, or subsidiaries within a company into a unified set of financial statements.	Included
Intercompany Process	Intercompany system generated balancing entries	Included
Alternate Fiscal Schedules for Reporting Only	When companies have different fiscal calendars	Up to 2
Accounting Books and Book Codes	Sets of books such as GAAP and Tax	Up to 2
Balancing by Company/Legal Entity and Fund		Included
Single Primary Chart of Accounts Only	A unified and standardized framework for organizing financial information and transactions within the Workday system.	Included
Tax Configuration	Local taxes assessed on the value added to goods and services.	Included
Reporting	Workday Delivered reporting that is activated for core financial needs using the Workday delivered "Aliases".	Income Statement Consolidated Trial balance Balance Sheet

Modifiable BPs	Workday delivered business processes specific to financials core	• Accounting Journal Event • Accounting Adjustment Event • Accounting Journal Unpost Event • Period Close Event • Finalize Allocation Event
Data Conversion		• Single Summarized Journal for Each Company Per Period with a Maximum of One Year Plus Current YTD • Transactional Journals Not Converted

Banking

Functional Area	Feature Definition	Scope Assumptions
Bank Account Management	Financial Institutions or banks	Included
Financial Institution	Financial Institutions or banks	Up to 3
Bank Accounts	Bank Accounts linked to banks	Up to 20
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10
Settlement	Process that facilitates all in-scope payments	Included
First Notice Rules	Automated recording of transactions from bank statement lines	Up to 15
Ad Hoc Payment	Ability to create Ad Hoc Payments	Included Business Process
Delivered Advanced Bank Matching Rules	Delivered Rules only, excludes custom matching rules	Included
Check Printing	Delivered check format only, no custom logic or layout changes	WD Delivered
Bank Routing Rule	Bank routing rules determine the bank accounts the settlement process uses to route payments that you initiate in Workday	Included
Electronic Payments	ACH and Wire Supplier payments	Included (if on integrations list)
Bank Account Transfer for Settlement		Included (if on integrations list)
Ad Hoc Bank Transaction	A bank transaction that is initiated manually and on an as-needed basis.	Included Business Process

Bank Account Signatories and Thresholds for Reporting		Included
Escheatment		Included
Modifiable BPs		• Settlement Event • Bank Account Transfer for Settlement • Bank Account Transfer Event • Ad Hoc Payment Event • Ad Hoc Bank Transaction Event
Data Conversion		• Beginning Balance - Bank account beginning balances • Unreconciled Open items - Unreconciled Open Bank Account items • Uncashed check conversion

Budgets

Functional Area	Feature Definition	Scope Assumptions
Financial Plan Type	Budget defined in the account system	Included
Plan Worktags	Worktags associated to budgets	Up to 10
Plan Structures	Plan structures are the foundation for plans and budgets in Workday.	Up to 2 for a budget hierarchy
Plan Templates	Plan templates consist of a base workbook and set configuration options to guide creation of future plan workbooks	Up to 2 for the Go-Live year only 1 plan template for each plan structure
Import Budget via Spreadsheet	Delivered spreadsheet integration to import budget data	Delivered
Budget Checking	Budget check functionality in Workday automatically checks your transactions against your financial plans	Included
Position Budgets		Included

Budget Hierarchy	Workday plan hierarchies enable you to link plans and budgets in a hierarchical structure, making it easier to control and report on multiple plans and budgets simultaneously. • Parent plans contain their own budget amounts or aggregate amounts from linked child plans. This enables you to view the details for the parent and linked child plans in 1 place. • You can use plan hierarchies to run a single budget check for multiple plans simultaneously, reducing the number of exceptions for review. • You can use plan hierarchies to budget check at higher levels than your budget entries. This gives you the flexibility to create budgets with more dimensions and control them at levels that aggregate your budget amounts based on fewer dimensions.	Up to 1
Reporting	Budget vs actual by cost center (Workday delivered report)	Delivered
Modifiable BPs		• Budget Approvals & Amendments • Budget Checking
Data Conversion		1 year of Budget data

Supplier Accounts

Functional Area	Feature Definition	Scope Assumptions
Supplier Invoice	Physical or electronic documents from vendors providing purchase and payment information	Up to 1 EIB template for all suppliers' invoices
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10
Supplier Contracts	If Procurement is not in scope, then only functionality around Supplier Invoice Scheduling will be available.	Included for Scheduled or Manual Invoice Contract Types Only
Supplier Invoice Request	Create a payment request for goods or service lines in Workday by adding invoice information to the request. After the payment requests are approved, Workday converts them into supplier invoices.	Included
Supplier Invoice Retention	Payment Retention Functionality	Included
1099 Adjustment	Business process to enable updates to 1099's	Included
1099 Suppliers	1099 Suppliers reporting of payment data to the IRS	1099 Suppliers
Supplier Connection	Enables multiple remit-to bank accounts, addresses and name per supplier	Included
Prepaid Spend Amortization	Process and account for prepaid invoices and related amortization within Workday, without the need to outside spreadsheets and manual journal entries	Included
Intercompany Supplier Invoice	Workday generated invoicing of one legal entity from another legal entity under the client’s umbrella. Includes direct intercompany and pay-on-behalf of invoicing	Included
Supplier Request	Business process to request a new supplier	Included
Remittance Advice (Standard Format)	Notice of ACH remittance to suppliers	WD Delivered

Tax Authorities	The various governmental agencies responsible for administering, collecting, and enforcing tax laws and regulations. These entities are likely referenced in relation to payroll processing, tax withholding, tax reporting, and compliance with tax regulations specific to different jurisdictions where an organization operates. Ex. State of Minnesota	Up to 5
Tax Rates	The specific percentages or amounts set by various tax authorities that a supplier employer must apply to an employee's income for tax withholding purposes. Ex. City, county, and state individual rates	Up to 10
Tax Codes	Specific designations used within the software to categorize and manage various types of taxes that an organization needs to account for. Ex. Shakopee (7.38%) - comprised of city, county, and state Tax Rates	Up to 10
Workday Invoice Automation with OCR scanning	Workday	Included
Modifiable BPs		• Supplier Invoice • Supplier Change Event • Supplier Event • Supplier Request • Supplier Invoice Request
Data Conversion		• Suppliers and Supplier Connections with activity within 12months preceding the go-live date • Open for Supplier Invoices for Suppliers Included in transaction currency • 1099 YTD balance (only applies if client is going live in middle of calendar year)

Assets

Functional Area	Feature Definition	Scope Assumptions
Asset Accounting	Accounting treatment for registered assets	Included
Multi Asset Book Accounting	Allows an asset to be depreciated differently to meet various reporting requirements. An Accounting Asset Book posts to one and only one Book Code. Each book tracks the financial transactions, performance, and valuation of a specific asset class.	Included
Asset Sharing	Asset sharing enables the ability to split asset cost and depreciation across multiple cost centers or other worktags	Included
Depreciation	Workday provided methods of deprecating methods	Up to 10 Profiles
Asset Book Rules	Asset book rules identify capital assets and assign depreciation profiles to depreciable capital assets	Up to 10
Leased Assets from Supplier Contract	Assets tied to a lease from supplier contracts. Procurement must be in scope	Included
Pooled Assets	Assets that consist of a group of similar tangible items that you register as a single asset in Workday	Included
Asset Adjustments	Asset cost & in-service date adjustment events	Included
Asset Tracking	Assets tracked separately without affecting any accounting activities	Included
Asset Transfer	Event that allows for the transfer of assets from one worker, location, or worktag to another	Included
Asset Reclassification	An event that provides the ability to change spend categories and other details for capital assets with posted depreciation, reclassify the spend category	Included
Work in Progress Capital Assets (Projects - Related)	Assets tied to the capital projects.	Included
Asset Book	For accounting and reporting purposes (i.e., tax or alternate accounting books)	2 Included (1 Accounting and 1 Other for reporting purposes)
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10

Functional Area	Feature Definition	Scope Assumptions
Modifiable BPs		Asset Registration
Data Conversion	Current Assets that are registered within the company. It is best to clean out the registry and not bring over disposed assets	Issued assets and actively depreciating capitalized assets only. Active capitalized assets only up to13,000 assets.

Customer Accounts

Functional Area	Feature Definition	Scope Assumptions
Customer Invoice	An electronic or paper document used to charge customers for goods and services.	Up to 1 Customer Invoice Layout (Configured using Delivered Business Form (no customizations))
Customer Payment	An electronic or physical payment by a customer for goods and services	Included
Delivered Auto-Apply Payment Rules Only	Extended Payment Application Rule Set	Up to 8
Intercompany Invoice	Ability to raise invoices to affiliated entities not on Workday (or not in client tenant).	Included
Customer Invoice Maintenance	A set of standard predefined rules within the system that automatically determine how incoming payments should be applied to outstanding invoices or accounts receivable.	Included
Customer Statement (Standard Layout)	A report that details a customer's open balance, open invoices and payments	Up to 1 Customer Statement Layout [Configured using Delivered Business Form (no customizations)]
Cash Sale	Sales conducted in cash vs electronic payments	Included
Customer Refund	Business process that determines how customer refunds are handled	Included
Deferred Revenue Recognition	Revenue recognition schedule using deferred revenue templates	Included
Customer Deposit	Customer payment deposited on a bank account	Included
Bad Debt Write Off	Method of writing off customer open balances	Included
Receivable Aging	Tracking and reporting of the open customer invoices by time period	Included
Collections and Dispute Activities	Tracking and reporting of customer collections and dispute activities	Included

Functional Area	Feature Definition	Scope Assumptions
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10
Tax	Tax codes, rates, & authorities	As outlined in Supplier Accounts
Modifiable BPs		• Customer Invoice Event • Customer Invoice Email Event • Bad Debt Write Off Event • Customer Refund Event • Customer Event
Data Conversion		• Only Customers with activity within the last 12months preceding go-live date. • Open Account Receivables Items in transaction currency

Procurement

Functional Area	Feature Definition	Scope Assumptions
Requisition	Provides a method for worker to request the purchase of goods/services	Included
Purchase Order	Provides a method for sending purchasing document to supplier	Included
Change Order	Create change orders for issued purchase orders	Included
Receipt Accruals	Configuration to accrue purchase order lines that have been received but not invoiced	Included
Punchout Configuration	Catalog capability to access supplier punchout website Note – This is the functional effort. Need to ensure integrations are included in the Integrations section of the SOW.	Up to 3
Supplier Invoice Matching	Process that determines variances between supplier invoices and related business documents, including supplier invoice lines that exceed quantities or amounts of purchase order lines	Included

Functional Area	Feature Definition	Scope Assumptions
Supplier Contract	Provides spend vehicle for procuring goods and services. Allows for scheduled and manual purchase orders and supplier invoicing.	Included
Lease Contracts	Set up supplier contract that includes Financial and Operating leases	Included
Purchase Order (Standard Layout)	Workday delivered Purchase Order layout only	WD Delivered
Receipt	Receive goods and services from Purchase Order lines	Included
Sourcing	Requisitions sourced to purchasing documents	Included
Return to Supplier	Return goods to suppliers	Included
Matching Override	Define reasons for workers to request an override for supplier invoices in match exception	Included
Supplier Contract Amendment	Make changes to an existing supplier contract	Included
Payment Retention	You can set up payment withholding to capture and track payment amounts using purchase orders and supplier contracts	Included
Procurement Card		Included – Visa through Wells Fargo Bank
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10
Modifiable BPs		• Requisition Event • Change Order Event • Purchase Order Event • Supplier Accounts Match Event • Supplier Accounts Match Exception Override Event • Supplier Contract Event • Supplier Contract Amendment Event

Functional Area	Feature Definition	Scope Assumptions
Data Conversion		• Up to 500 Open Purchase Orders (includes both goods and services) • Up to 100 Open Supplier contracts • Receipt for Open Approved Purchases Orders

Projects

Functional Area	Feature Definition	Scope Assumptions
Project	Objects that enable you to effectively plan, track, and manage work	Included
Workday Standard Project Reports	Workday provided project reporting	WD Delivered
Task	Tasks are associated to projects	Included
Project Resources	Resources that can be assigned to a project	Included
Idea	Task that allows users to submit an idea for work/project that supports an overarching organization goal	Included
Standard Cost Rate Sheets	Standard Cost Rate Sheets use a combination of Project Cost Rate Rules to assign an internal hourly cost rate to workers that match said combination	Included
Project Cost Rate Rules	Condition rules that will drive costing functionality when using Standard Cost Rate functionality	Low to Medium Complexity up to 3 dimensions
Custom Validations	Defined transactional validations that help workers identify transaction issues	Up to 10
Modifiable BPs		• Create Project • Verify Capital Project Expense • Resource Plan Line

Functional Area	Feature Definition	Scope Assumptions
Data Conversion		• Active Projects (up to 500) • Project Plan • Resource Plan • Task Resource

Inventory

Functional Area	Feature Definition	Scope Assumptions
Inventory for internal consumption only, not for retail or resale		Included
Sourcing requisitions from inventory		Included
Ad-hoc and Cycle inventory counts		Included
Item Master	Total number of purchase items, stock and non-stock, including item identifiers, stocking units of measure, and unit of measure conversion factors	Up to 3,000
Inventory Sites	Number of perpetual inventories that include perpetual inventory asset value. Example: Main Warehouse	Up to 15
Define put-away rules	Rules to automatically increment on-hand quantities for items that exist in corresponding stocking locations.	Included
Cost Validation Method	Inventory Costing Method	Average
Reporting		Inventory Operations Dashboard, Supply Chain Worker Activity, and the delivered supporting reports.
Modifiable BPs		Quick Issue Inventory Stock Request Event Inventory Pick List Event
Data Conversion		Purchase Items Inventory Balances

Funds & Grants

Functional Area	Feature Definition	Scope Assumptions
Sponsors	Sponsors, sponsor types, contact details	Included
Catalog of Federal Domestic Assistance (CFDA) (via EIB)		Included
National Science Foundation codes used for Award reporting		Included
Special Condition Types		Included
F&A Exceptions and Waivers		Included
Calculate F&A Costs		Included
F&A Revenue Allocation		Included
Sponsor Payment Processing		Included
Object Class Mapping	Mapping of spend categories to sponsor categories for reporting purposes	Up to 2
Award Contracts	Terms and conditions of the awards	Included
Letters of Credit	Federal sponsor payment collection method	Up to 1
Billing Schedules	Installment, prepaid or transaction-based billing	Included
Award Posting Intervals	Time periods and schedules for awards	Included
Spend Restrictions	Ability to allow or disallow spend based on sponsor requirements	Included
Subawards and Subrecipients	Entity acts as middleman and awards dollars to a local subrecipient	Up to 3
Facilities and Administration	Indirect spend that will be reimbursed by the sponsor	Up to 10
Import Grant via Spreadsheet	Included spreadsheet integration to import grants	Included
Effort Certification		In scope
Reporting	Alight POV dashboard reports	Included
Modifiable BPs		Award Event Award Amendment Award Correction Award Spend Restrictions and Grant routing/approval for Sponsored Award processing on spend BPs Security Roles and Assignments for

		Award and Grant reporting and routing
Custom Validations	Restrict/require conditions on transactions	Included
Grant Budget Structures	Grant budget configuration	Up to 2

Expenses

Functional Area	Feature Definition	Scope Assumptions
Expense Reports for Workers	Allows for workers to submit reimbursable and credit card expenses	In Scope
Mileage Rates	Mileage rates held in a mileage rate table assigned to an expense item	Up to 1
Expense Report Payment	Method of settling expense report payment obligations	In Scope
Create Delegation	Delegating admin rights to approve and execute expense reports	In Scope
Workday Delivered Expense Item Attributes	Workday Delivered attributes tired to a specific expense item	In Scope
Configurable Expense Item Attributes	Configurable reporting attributes tied to a specific expense item	Up to 5
Expense Report Instructions	Configured user instructions to provide a communication to user during expense report entry (Spend Instructions - Expense Report)	In Scope
Mobile Enablement	Enable Workday mobile apps for Expenses to collect receipts and submit expense reports	In Scope
Payment Election	Allows users to enter payment elections utilizing self-service	In Scope
Expense Report for Pre-Hire	Enable Create Expense Report event to detail expenses incurred by pre-hires to report and analyze company spend	In Scope

Functional Area	Feature Definition	Scope Assumptions
Guest	Enable Create Expense Report event to detail expenses incurred by guests to report and analyze company spend.	In Scope
Custom Validations	Data validations on Expense Reports	Up to 10 Custom Validations
Expense Rate Table	Expense rate tables are used to determine eligibility and reimbursement amounts for expense items on expense reports, such as a mileage rate tables and per-diems.	Up to 5
Simple Per Diem (non-Travel Journal)		Up to 10
Any Credit Card Integrations in Scope for Expenses related to Worker T&E Expenses Only		If Integration is In Scope
Modifiable BPs		• Expense Report Event • Payment Election Enrollment Event
Data Conversion		Worker Payment Elections for Expense Payments only

Workday Financial Planning

Product	Description	Scope
Financial Planning	Structure	Budget and forecast up to 10 years out.
		All planning periods will use a common / single methodology.
		Planning occurs in time periods of months, quarters or years
		One Chart of Accounts structure, one calendar, and a common set of templates and processes across the organization
		Up to 20 Legal Entities and 20 Entity Currencies (Single Currency per Entity)
	Revenue	Up to 5 Revenue Models and up to 2 Manual Input Sheets with up to 4 Dimensions each (each Sheet provides a single interface to view, enter, and update data). - No calculations. Models to be identified during Architecture phase.

Product	Description	Scope
	Operating Expense	Up to 50 individual accounts calculated by formula, Up to 50 Individual accounts calculated by historical run rate multiplied by an adjustment factor Up to 20 supporting schedules with line-item row detail (i.e., vendor, etc.) Up to 2 Depreciation Schedules for Capital Planning
	Personnel Expense	Up to 2 Personnel Expense models (current roster and open positions) - With up to 3 Employee Groups: Salary, Hourly and Contingent Labor. Up to 50 total calculations across the 2 models. (Capitalized labor is not included)
		Manual Data Entry for Transfers, Splits, Planning Allocations by Level (Single-Step, Not Sourced from Payroll data) Manual changes made in one version do not persist upon a refresh of data from source.
		Fringe Benefits and Tax Rates
		Merit and Bonuses are calculated as a percent of total pay based on role, worker or total company.
	Capital Expense	Capital Expense Model - Using straight line depreciation for newly planned assets. - Summary depreciation loaded for existing assets (not at asset level) - Capital model does not include capitalized labor or calculation of depreciation on existing assets.
	Deployment Approach	The Workday Adaptive Planning deployment start date will align with the completion and validation of the FDM, end to end testing and a full month of GL Actuals loaded and validated in the Workday Financials End to End (E2E) tenant or Gold Tenant. The Adaptive meta-data structure will be manually built and the Workday data will be manually loaded in Adaptive initially. Once the Workday Production tenant is built a reconciliation of the manually built Adaptive structure and Production Workday tenant will occur to ensure alignment. Once aligned automation of the build of Adaptive structures and the load of Workday data will occur.

Product	Description	Scope
	Financials and HCM Workday Data Management	Strada will configure the automation synchronization of the following metadata and data: - Metadata: Accounts - Metadata: Levels - Metadata: Dimensions & Attributes (up to 20) - User Synchronization Strada will define and configure required Advanced Reports and Workday Data Source for the following sources of data within the Customer's Workday Tenant: - GL trial balance - Current personnel roster - Open positions / requisitions - Currency Translation Rates (Average and End of Month only) - Matrix Report for General Ledger Drill Through - Publish of Financials Budget Balances by: Account, Level and Dimension to Workday
	Security	Enable security on Levels and configure Dimensional Access Control for up to one additional dimension
	Reporting	One Income Statement Format (account / dimensions) that incorporates all templates and business logic Up to 10 KPI's, Conduct up to 6 remote hands-on workshops (up to two hours each) to walk-through building reports/dials/dashboards. Provide best practice guidance around design Consult with Customer on specific dial design challenges; Help Customer with how-to questions. Reports and Dashboards to be completed by Customer prior to UAT.
	Training and Enablement	Knowledge transfer and documentation provided for all planning models built using Strada's documentation format and tools (1 page per model)
		End-user documentation and end user training is excluded
		Final review & testing: Support of Customer UAT scripts development
		Admin training: includes training for up to 5 power users on administrative responsibilities and maintenance of the system for up to 4 hours.
		Post Production support: 4 weeks of support for up to 10 hours per week
	Not Included	Financial Consolidations (unless purchased via Additional Scope) Balance Sheet and Cash Flow (unless purchased via Additional Scope) Payroll or Payroll Costing Allocations as a source

Prism (for archival)

Strada will implement the Prism platform to portray Client's legacy/historical data.

Assumptions:

- Import PRISM objects to Workday tenants in support of 4 archival reporting use cases.
  - Timecard history
  - Finance – General Ledger
  - Payroll – Deductions, taxes and employee pay
  - Employee promotions
- Does not include any data transformation (aggregation, filtering), enhancement (calculated logic), and/or blending (joins/unions).
- Any changes to the packaged content of this Statement of Work will initiate the Change Order Procedure.
- Strada will:
  - ingest the provided data extracts, as is into Prism
  - validate the schema and row count
  - secure, and publish the data within Workday
  - expose a custom report with the same schema as the data extract provided, to enable Client to search with archival data
- Client will:
  - leverage existing validated reports in their legacy system for each identified use case
  - identify up to 8 prompt fields for each use case custom report
  - provide associated document information within the data extract
  - identify and execution of legacy reports

Functional Area	Functionality	Assumption
Prism	External files (Customer defined layout)	Delimited flat file(s) per use case
Prism objects/ETL datasets	Base tables	1 per use case (depending on data volume, extracts may need to be batched prior to load)
	Derived datasets	1 per use case
	Published datasets	1 per use case
Reporting	Custom report	1 per use case
	Dashboards	Excluded
	Scorecards	Excluded
	BIRT reports	Excluded
	Discovery Board visualizations	Excluded
Integrations	Workday Connectors (cloud connect or core connectors)	Excluded
	EIB integrations	Excluded

	Prism integrations	Excluded
Security	Enable the Workday delivered Prism functional area, Security Domains and Assignable Roles.	Included
	Enable one Custom Security Domain or apply one existing Security Domain to secure the Prism published data source.	Included
	Create a new Prism Administrator security group and enable required access to the Workday delivered Prism Security Domains.	Included
	Enable one of following organizations as securing entities (Company, Cost Center, Location, or Supervisory Organization)	Excluded
	Enable a separate Security Domain for specific packaged fields.	Excluded
Analytics Enablement Session	Provide a 1-hour analytics enablement session to demo full Prism capabilities and review accelerators and or more sophisticated customer use cases.	Included

Custom Reporting

HCM Reporting

Module	Module Sub-Group	Functionality	Scope
HCM	**Reports**	Complete suite of Workday delivered reports for in-scope Functional Areas as supported by the current commercially available Workday release	Included
		Fit Gap Analysis for Legacy Reporting Requirements - Using Client provided key report inventory and report samples, Strada will work with Client to define custom report needs, hours effort estimates, and priority. Strada will identify which Workday delivered reports can be cloned and modified to meet Client's reporting needs, and when a custom report would be required. Output from this assessment will be a ratified report inventory.	Up to 40 hours Analysis for up to 20 key existing reports

Module	Module Sub-Group	Functionality	Scope
		Reporting Pool Hours - Prior to the development of any custom reports, Strada will conduct a requirement gathering workshop(s) for the identified scope. Client will be responsible for completing Strada's report questionnaire as input to requirements gathering workshop. The Business requirements document will serve as the blueprint for the design and build of each report. Strada will develop custom reports based on priority until any remaining reporting pool hours have been used, if applicable. Any remaining custom reports not covered by the reporting pool hours that the Client would like developed can be included as part of the standard change order procedure. HCM custom reporting pool can be utilized for: • Knowledge Transfer to assist Client in building custom reports. • Custom Dashboards including Workday delivered reports or custom reports. • Custom business form layouts delivered via Workday Studio Report Designer (BIRT)* *Custom Business Form Layouts delivered via Workday Studio Report Designer.	Up to 100 hours

Finance Reporting

Module	Module Sub-Group	Functionality	Scope Assumption
FINS	**Reports**	Complete suite of Workday delivered reports for in-scope Functional Areas as supported by the current commercially available Workday release.	Included
		Fit Gap Analysis for Legacy Reporting Requirements - Strada will lead a reporting workshop to assess the fit/gap between Client's existing report inventory from current legacy system(s) and that of Workday delivered reports/Strada's Point of View (POV) reports. Client will be responsible for providing current state report inventory to facilitate assessment. Output from this assessment will be a ratified report inventory.	Up to 40 hours Analysis for up to 20 key existing reports

Module	Module Sub-Group	Functionality	Scope Assumption
		Custom reporting - Prior to the development of any custom reports, Strada will conduct a requirements gathering workshop(s) for the identified scope. Client will be responsible for completing Strada's report questionnaire as input to requirements gathering workshop. The Business requirements document will serve as the blueprint for the design and build of each report. Strada will develop custom reports based on priority until any remaining reporting pool hours have been used, if applicable. Any remaining custom reports not covered by the reporting pool hours that the Client would like developed can be included as part of the standard change order procedure. Custom reporting pool can be utilized for: • Knowledge Transfer to assist Client in building custom reports • Custom Reports and/or Worklets • Custom Dashboards including Workday delivered reports	260 hours
	Financial Statements	Standard Scope includes Balance Sheet, P&L/Income Statement, Trial Balance Report .	Included

Client reporting resources are strongly encouraged to complete Workday's Report Writer training class prior to the reporting test phase. Strada does not provide Report Writer training. Client will be responsible for the migration of Custom Reports created by the Client team.

The below table is an estimate of report development hours based on complexity to be used as a guideline for Client's reporting scope requirements. Hours are comprehensive per report and include the effort required for the requirements assistance, design, configuration, and testing of each report.

Complexity	Reporting Scope Description
Low	Low complexity report with a single data type per report (Demographic, Benefits, Payroll, etc.)
Medium	Matrix or Advanced Report
High	Report with more than 1 component (transformation, multiple report consolidation, Pre-defined Excel with formulas, PDF output, etc.). All BIRT and Composite reports.

Data Conversion – Pre-Processing offering

1. The following Tenant builds, and associated conversions will be completed for this effort:
    a. Foundation Tenant build used for Architect activities – Strada owned
    b. Configuration Tenant build used for Configuration activities – Strada owned

    c. End-to-End Tenant build used for test activities – Strada owned
    d. Parallel build used for parallel test activities – Strada owned
    e. Gold/Pre-Production Tenant build used for Deploy activities – Strada owned
2. Client is responsible for
    a. Provide all legacy data extract files in a consistent, repeatable format (e.g., consistent name and formatted pipe delimited txt file, or Excel file) by the agreed upon project timeline due dates and milestones. Any source-data errors encountered will be Client's responsibility to correct.
        I. Client owns updating invalid source/legacy data, incorrect headers, missing or incorrect columns and other file format issues with the legacy data reports.
    b. Unless specified, data pre-process assumes all HR, Payroll, and financial data will be coming from up to 1 source system for HCM/Payroll data and 1 for financial data.
    c. Legacy data extract reports will be transmitted to Strada via secure File Transfer Protocol (sFTP) and loaded to an Strada owned secure server. Once conversion into the Workday tenant has completed for the related tenant build, the data will be deleted from the secure server.
    d. Unless specifically requested, Legacy Data Extracts/reports should be top-of-stack records versus full history reports.
    e. As part of the Data Pre-Processing solution, Strada leads a series of collaborative data mapping sessions. In these sessions, Strada and Client identify mapping of source system fields to Workday fields. This includes the conversion logic and business rules for transforming the source system data to match Workday's data framework.
3. Strada will then be responsible for any transformation needed to convert the legacy data reports into the required Workday format to then load the data fully to the client's Workday tenants.
    a. All core conversion data will be loaded into the tenant utilizing Workday approved web-services. Client is responsible for all non-web-service based conversion activities. This includes but is not limited to any enterprise-interface-builder (EIB) files (catch-up transactions) and manually keyed catch-up transactions.
        I. Catch-up transactions include all modifications in client datasets between the extraction point-in-time for the tenant build and the release of the tenant by the Strada team.
        II. While Strada doesn't convert/pre-process catch-up transactions, Strada conversion and functional resources will support the client effort through answering questions on load nuances and assisting in error resolution.
    b. Client is responsible for initial data validation of all transformed/mapped files before the conversion load, and then full data validation of the in-tenant data after Strada has converted into the Workday tenant to ensure functional accuracy.
4. By default, Strada will not perform reloads of major conversion files after the final data due date for each prototype/sandbox/gold conversions have passed If such reloads or further data clean-up/reload time are needed, these should be discussed and are subject to a Change Order.
5. No data scrambling will be required to fulfill the effort defined in this Statement of Work.

Integrations

Integrations Assumptions

1. For inbound integrations (data originates in an external system and is loaded into Workday), Client or related third party will be responsible for providing the data in a Workday-specified format.
2. For outbound integrations (data originates in Workday and is sent to an external system), the integration owner will be responsible for the effort required to extract the data out of Workday into the format required by Client or related third party.
3. For bidirectional integrations both in/out happen within the same integration process and therefore would count as a single integration. The Integration owner and related third party will be responsible for providing the data in a Workday-specified format.
4. Strada and Client will use Strada's proprietary integration tracking tool to capture requirements, store designs, track status and track defects on each integration that is Included.

5. Client and Strada will finalize the inventory of integrations in the project scope by the completion of the Plan stage. The inventory will identify the integration, the direction of the integration and the integration technology used. Additionally, any addition or deduction to the inventory of integrations as referenced by the Integration Inventory within this SOW, will be captured in a Change Order for a change in cost or reallocation of hours.
6. Any integration added to scope after the completion of Plan Stage will be documented through the Change Order procedure and will be delivered after the Workday live date at a date identified in the Change Order.
7. For inbound integration, the integration owner will build and unit test each integration during the Architect & Configure Stage based on a mocked-up file. When possible, the integration owner will receive and load a file from the vendor to ensure that it passes basic formatting, transmission and structural needs. If not possible in the Architect & Configure stage, this will be done as part of End-to-End testing.
8. For outbound integrations the integration owner will send a file to the vendor to compare the produced file to ensure that it passes basic formatting, transmission, and structural needs. If not possible in the Architect & Configure stage, this will be done as part of End-to-End testing.
9. Client will be responsible for executing all End-to-End integration testing during the Test stage. End-to-End Testing for integrations is the process of having scenarios flow from entry into Workday through to the creation of data in an outbound file or the inverse of validating that data received in an inbound file for specific scenarios has created the expected results in Workday.
10. Strada will demonstrate to Client how to run the integrations for testing for all Strada owned integrations
11. Strada will support testing during the Test stage for each defect logged. If a defect goes beyond the current documented requirement, an enhancement will be documented and may be delivered after Live Date depending on complexity.
12. Client will provide testing signoff for each integration prior to the end of the Test stage.
13. Strada will facilitate knowledge transfer sessions to transition integrations to the appropriate Client resources during the Deploy stage to validate the customer is able to successfully run integrations and interpret basic results for all Strada owned integrations.
14. All in-scope integrations with approved requirements will be expected to go live within the deployment timeline unless specified directly in this SOW.
15. Client will own and manage all interaction with third party vendors outside of Strada and Workday.
16. Client assumes responsibility for any delays incurred by third party vendor's inability to meet project timelines.
17. All integrations will be migrated twice, once as part of the End-to End Tenant build, and once as part of the Pre-Production Tenant build.
18. All integrations are scoped by Strada to be built on the Workday integration platform (e.g., Workday Cloud Connect, Core Connectors, EIB, Studio). In the case where Client wants to build an interface using a different platform, via middleware or otherwise, this decision must be vetted to compare overall cost and timeline and may require a change order to proceed.
19. All integrations are assumed to use Workday's integration framework accelerators and connectors as appropriate. Examples include the HCM change framework and the Workday payroll interface framework. The Workday payroll interface framework returns information sufficient to process the current pay period. The Workday payroll interface framework may consist of full employee extract files or employees' data change files that contain employee demographics, job, organization, compensation, earnings/deductions, and direct deposit data. We also assume Workday Cloud Connect Benefits connectors will be used if available. Any custom interface not accomplished using the framework accelerators may result in additional effort. For Cloud Connect integrations, Strada will be responsible for configuring, testing, and deploying the integrations with build performed by Workday as part of Workday's packaged Cloud Connect network.
20. All integrations will go live with their corresponding functional deployment. Any change in schedule or timeline will be subject to the Change Order Process.

21. If not already conducted, Strada recommends an assessment of all integrations listed to determine if the transaction volumes for each warrant the development of an automated integration.
22. Unless otherwise specified in integration assumptions, Strada is not responsible for loading information directly into the target system or for extracting information directly from the target system.
23. Where a client or the client's vendor will build an API to access Workday data via web service, Strada will provide minimal/basic input on Workday's API framework but expects the client or vendor to have sufficient and applicable expertise around API usage.

Integration Types

The following table describes the categories of Workday integration templates available for configuration with related type and assumed complexity.

Integration Technology	Integration Type	Integration Complexity	Description
Cloud Connect	Catalog	Low or Medium	Workday's vendor-specific integration templates also referred to as Packaged
Core Connector	Connector	Medium	Workday's generic output integration templates also referred to as Framework
Custom EIB	EIB	Medium to Very High	Workday's custom integration platform templates using the Enterprise Integration Builder (EIB)
Custom Studio	Custom	Medium to Very High	Workday's custom integration platform templates using the Studio development tool, integrations using these templates are not recommended for inclusion Included and may not be delivered in time for Workday Live Date
Web Service	Custom	Medium to High	Workday's application programming interface (API) services

The following table describes how these integration types relate to assumed development complexity:

Integration Complexity	Estimated Hour Range
Low	20-59
Medium	60-79
High	80-99
Very High	100+

Integration Inventory

Based on Strada's understanding of Client's requirements, Strada has estimated:

Integration Type	Assumptions
Strada	50

Shared	0
Client	0
Total Integrations	50

Integrations not explicitly listed in the integration inventory are considered out of scope, the specific integrations Included are:

Integration #	Integration Name	Direction	Complexity	Owner	Type
INT001	Cayenta CIS & Billing - Journal	Inbound	High	Strada	FINS
INT002	ESRI Geospatial Information Systems GIS	Inbound	Medium	Strada	FINS
INT003	Fleet Focus Fleet Management	Bi-directional	Very High	Strada	FINS
INT004	Fore! Miscellaneous AR	Inbound	High	Strada	FINS
INT005	Civic Rec Miscellaneous AR	Inbound	Medium	Strada	FINS
INT006	Blackbaud Miscellaneous AR	Inbound	Medium	Strada	FINS
INT007	P-Card	Inbound	Low	Strada	FINS
INT008	PERSI State Pension System Demographics outbound – Eligibility	Outbound	Medium	Strada	HCM
INT009	PlanIt Time Keeping	Bi-directional	Very High	Strada	HCM
INT010	Crew Sense Time Keeping	Bi-directional	Very High	Strada	HCM
INT011	Background Check (assumes Workday Partner)	Bi-directional	Low	Strada	HCM
INT012	SAML SSO	Bi-directional	Low	Strada	HCM
INT013	Active Directory Provisioning	Bi-directional	Medium	Strada	HCM
INT014	ACH Payments - Payroll	Outbound	Low	Strada	HCM
INT015	Wire Transfers - Bank of Idaho	Outbound	Low	Strada	FINS
INT016	Wire Transfers - Wells Fargo	Outbound	Low	Strada	FINS
INT017	ACH Payments - Banking - Bank of Idaho	Outbound	Low	Strada	FINS
INT018	Positive Pay - Bank of Idaho	Outbound	Low	Strada	HCM
INT019	Bank Statement Inbound - Bank of Idaho	Inbound	Low	Strada	FINS
INT020	Bank Statement Inbound - Wells Fargo	Inbound	Low	Strada	FINS
INT021	Bank Statement Inbound - Frontier Bank	Inbound	Low	Strada	FINS
INT022	Medical Enrollment Outbound (LineCo)	Outbound	Low	Strada	HCM
INT023	Medical Enrollment Outbound (Pacific Source)	Outbound	Low	Strada	HCM
INT024	Dental Enrollment (Delta Dental)	Outbound	Low	Strada	HCM
INT025	Dental Enrollment (Williamette)	Outbound	Low	Strada	HCM

INT026	Life Insurance Provider Demographic(Symetra)	Outbound		Strada	HCM
INT027	Voluntary Insurance Outbound (Assurity)	Outbound	Low	Strada	HCM
INT028	HSA/FSA Spending (Health Equity)	Outbound	Medium	Strada	HCM
INT029	COBRA Provider (initial rights) GBS (3rd party)	Outbound	Medium	Strada	HCM
INT030	COBRA Provider (Qualifying events) GBS (3rd party)	Outbound	Medium	Strada	HCM
INT031	Critical and Accident Insurance (Voya)	Outbound	Medium	Strada	HCM
INT032	HealthJoy Demographic (online mobile medical)	Outbound	Low	Strada	HCM
INT033	HSA/FSA Spending (Health Equity) Contributions	Inbound	Medium	Strada	HCM
INT034	457b Deferred Compensation (Nationwide - St of ID)	Outbound	Medium	Strada	HCM
INT035	457 Deferred Compensation (Corebridge)	Outbound	Medium	Strada	HCM
INT036	INT - add barcode scan platform	Outbound	Low	Strada	FINS
INT037	INT - add RF scan platform	Outbound	Low	Strada	FINS
INT038	INT - add punchout placeholder 1	Outbound	High	Strada	FINS
INT039	INT - add punchout placeholder 2	Outbound	High	Strada	FINS
INT040	INT - add punchout placeholder 3	Outbound	High	Strada	FINS
INT041	SpryPoint - TBD	Inbound	Low	Strada	FINS
INT042	SpryPoint – Work Order	Outbound	Low	Strada	FINS
INT043	SpryPoint Asset Adjustment	Inbound	High	Strada	FINS
INT044	Assets Inbound (from GIS)	Inbound	Medium	Strada	FINS
INT045	Assets Outbound to SpryPoint	Outbound	Low	Strada	FINS
INT046	Purchase Items Outbound to SpryPoint	Outbound	Low	Strada	FINS
INT047	SpryPoint Inventory Adjustments	Inbound	Medium	Strada	FINS
INT048	Employee Demographics to SpryPoint	Outbound	Low	Strada	FINS
INT049	Time Tracking Inbound from SpryPoint	Inbound	High	Strada	FINS
INT050	CanAm Teller Journal	Inbound	Medium	Strada	FINS

Strada Owned Approach

Strada fully owns the requirements gathering, design, building testing and migration of integrations. These integrations will be denoted as “Strada” in the integration table.

Assumption	Description
Ownership of Cloud Connect	The development of Cloud Connect interfaces must be owned by Strada per Workday's guidelines.

Requirements and design	Strada will be responsible for requirements gathering.
Migration of configuration	Strada will migrate these integrations.
Development, testing and support	Strada will own the development, testing and support of these integrations.

RACI Assumptions

The table below outlines major tasks that are completed during each stage of the Workday implementation. One of our important tools for tracking roles & responsibilities is the Responsibility Assignment Matrix (RACI matrix). RACI stands for:

- Responsible—Who is/will be doing this task? Who is assigned to work on the task?
- Consulted—Anyone who can tell me more about this task? Any stakeholders already identified?
- Informed—Anyone's work depends on this task? Who has to be kept updated on the progress?
- Accountable—Who is responsible if this goes wrong? Who has the authority to make the decision?

Pre-deployment Readiness

Pre-Deployment Readiness Services	Strada	Client	Deliverables
Stakeholder Interviews Conduct up to 8 interviews with key HRIS/IT, operations, and functional leaders to identify potential risks to the project, business concerns, etc.	R/A	C/I	Stakeholder Interview Summary
Project Readiness Conduct up to 5 1.5-hour Readiness workshops covering: resource planning, scope, and timeline, guiding principles, decision making and governance, touch points, foundational decisions, preparing for key activities and your deployment experience.	R/A	C/I	Facilitate readiness meetings with Client core team Session materials and identification of RAID (Risks, Actions, Issues, Decisions) items
Change Management Readiness Workshops Conduct up to 2 1.5-hour Change Management workshop sessions to review Strada's change management approach and framework for Workday deployments. Discuss roles and responsibilities to initiate discussions on early CM priorities.	R/A	C/I	Change Management approach and framework overview material Session materials and identification of RAID items
Data Conversion Approach Conduct up to 2 1.5-hour Data Conversion Session to discuss data conversion needs associated with deployment and define data conversion approach. Review data elements needed for initial data conversion and current state data sources	R/A	C/I	Data conversion approach Session materials and identification of RAID items

Foundation Data Conversion Workshops Conduct up to 4 30-minute Data Conversion Using the Strada Workday conversion templates as guide, Strada will support this process in answering questions about the templates and about Workday.	R/A	C/I	Data conversion guidance framework Session materials and identification of RAID items
Integrations Overview and Inventory Alignment Conduct up to 2 2-hour Integrations Overview Session to review integrations delivery approach, integrations inventory, ownership alignment, and identify potential integration risks and opportunities	R/A	C/I	Integration approach, integrations inventory, and ownership alignment Session materials and identification of RAID items

Deployment

Plan			
Workstream	**Key project tasks & deliverables**	**Strada**	**Client**
Project Governance	Workday Client onboarding	C/I	R/A
	Identify Client Core Project Team, Client Domain Leads, Key Decision Makers, Executive Committee Members	C/I	R/A
	Schedule and attend Workday Training for Core Project Team	C/I	R/A
	Manage Client resources for project related activities	C/I	R/A
	Define Project Governance Structure • A governance model contains integrated meeting details that establish the frequency, inputs, objectives, outputs and attendees for all levels. • Establish the ownership of responsibilities for the team resources at all defined levels, providing clarity on who is responsible for what and that escalation procedures, when required, are agreed upon.	R/A	C/I
	Draft project plan • A document that contains the details of the project activities, owners and completion dates. Strada will provide a template that will serve as the project schedule's foundation.	R/A	C/I
	Establish project repository	R/A	C/I
	Conduct project kickoff meeting • Verification that both Client and Strada have a consistent understanding of project goals, objectives and timeframes. • Executive sponsorship is formalized, and project communication strategy is shared. • The Strada Project Manager will educate the Client project team on how to work with Strada and review key artifacts used throughout the project.	R/A	C
	Develop Tenant Management Plan	R/A	C/I
	Manage Strada resources for project related activities	R/A	C/I

Functional	**Provide Initial Prototype Build Data Gathering Workbook** • A template of the key data elements required to build the Foundation Tenant.	R/A	C/I
	Completed Initial Prototype Build Data Workbook • Template with all required fields populated by Client with current data from their legacy application and returned to Strada for configuring the Initial Prototype.	C/I	R/A
	Build Initial Prototype—Foundation Tenant • Initial Workday Prototype configured using the completed Data Gathering Workbook. • This prototype will be used during the project kickoff and requirements workshops.	R/A	C/I
Integrations	**Integration Questionnaires walkthrough** • Prior to the end of Plan, Strada to execute integration questionnaire walkthrough with Client.	R/A	C/I
	Completed Integration Questionnaires • Prior to the end of Plan, Client to complete integration questionnaire for the Integration Requirement Finalization sessions.	C/I	R/A
HCM Custom Reporting Fit/Gap	**Reporting Workstream Initiation** • Strada provide HCM report inventory template and conduct walkthrough with Client.	R/A	C/I
	Client adds requested HCM reports and report samples to HCM report inventory.	C/I	R/A
	Strada schedule reporting discovery workshop and fit/gap working session(s).	R/A	C/I
FIN Custom Reporting Fit/Gap	**Reporting Workstream Initiation** • Strada provide FINS report inventory template and conduct walkthrough with Client.	R/A	C/I
	Client adds requested financial reports and report samples to the FIN report inventory.	C/I	R/A
	Strada schedule reporting discovery workshop and fit/gap working session(s).	R/A	C/I
Conversion	**Compile and deliver Foundation Tenant data** • A small subset of data for the full population used for demonstration purposes throughout the requirements workshops.	C/I	R/A
	Convert Foundation Tenant data • This prototype will be used during the project kickoff and the requirements workshops.	R/A	C/I
Production Preparedness	**Conduct** Production Preparedness Kickoff • Educate the Client project for life in Production and discuss the meetings throughout the project.	R/A	C/I
Testing - Essential with Automation	Designate a dedicated, full-time Client Testing Lead to manage and oversee Client test deliverables.	C/I	R/A
	Prepare Testing Introduction with Unit Test resource estimators	R/A	C/I
	Prepare Testing workstream kick off materials	R/A	C/I
	Conduct Testing workstream kickoff session	R/A	C/I
	Populate Project Plan aligned to key milestone dates	R/A	C/I

	Complete Program Administration tasks - update weekly status report and project plan, attend status meetings	R/A	C/I
	Finalize Project Plan in coordination with Client Testing Lead	R/A	C/I
	Develop overall Workday training plan for testers	C/I	R/A
	Identify Client testing resources (Functional & Integration for Unit Test and End-to-End)	C/I	R/A
	Schedule and run regular Test Lead Planning meetings with Client Test Lead counter-part and Project Managers	R/A	C/I
Change Management – Lead and Execute	**Change Management Kickoff** • Review scope and change journey • Review of Strada-provided change management artifacts, tools and templates. • Alignment on team roles & responsibilities	R/A	R/C
	Change Management Strategy Establish the overarching framework for the Change Management workstream, including: • Framework for delivery • Success measures • Risks to adoption • High-level timeline	R/A	R/C
	Stakeholder Analysis • Analysis to determine specific stakeholders and stakeholder groups that require regular change management interaction throughout the deployment. **Note:** *Stakeholder Analysis is a living document that will be maintained throughout the course of the project.*	R/C	R/A
	Change Management Work Plan Development and ongoing management of work plan for the Change Management workstream.	R/A	R/C

Architect & Configure			
Workstream	**Key project tasks & deliverables**	**Strada**	**Client**
Project Governance	**Finalize project plan**	R/A	C/I
Functional	**Conduct Foundational Blueprint, Design/Configuration workshops**	R/A	C/I
	Populate Configuration Data Gathering Workbooks (Templates) • The Configuration templates are used to document Configuration being delivered and decisions captured during working sessions.	C/I	R/A
	Conduct Business Process workshops • Using Strada POV Workday optimized business processes as a starting point, Strada will conduct Business Process workshops to demonstrate delivered business processes and analyze, optimize and document any changes to the selected business processes as described in the Project Scope.	R/A	C/I
	Complete Design/Configuration workbooks	C/I	R/A

	Conduct Reporting discussions • Strada will conduct discussions to review available Workday-delivered and Strada POV-delivered reports. Further discussions will be had to identify what custom reports might be needed in addition to what is already delivered.	R/A	C/I
	Complete Custom Report Requirement templates • The Report Requirement templates are used to document the desired criteria, fields and sorting to be used when building the reports.	C/I	R/A
	Complete Knowledge Transfer plan	R/A	C/I
	Build Configuration Tenant • Configuration Tenant built based on the information collected in the Requirements Workshops. • This build includes configuration data, as well as full worker data provided by Client in the Data Gathering workbooks	R/A	C/I
	Conduct Unit Test / Client Confirmation sessions • Facilitated session to review Configuration Tenant Build based on requirements gathered during the Requirements Workshops	R/A	C/I
	Conduct Unit Testing (Configuration Tenant) • The Client team is responsible for validating its accuracy using the Foundational Blueprint as a point of reference.	C/I	R/A
	Identify Required Configuration and Business Process Changes	C/I	R/A
	Payroll Lead - Draft Parallel Testing strategy	R/A	C/I
	Payroll Lead provides draft Payroll Parallel Schedule and Timeline	R/A	C/I
	Payroll Team finalizes Parallel Testing Plan —including plan for catch up transactions, integrations and data load requirements	C/I	R/A
Integrations	**Conduct integration requirement finalization workshops** • Strada will schedule and execute Integration Requirements workshops to review completed integration questionnaires and document further required information, including details of the integration data endpoints to draft requirements. • Alignment of integration security approach.	R/A	C/I
	Draft requirements for Strada-owned and Shared-development integrations documenting the business needs for each integration including data elements, file specifications and affected business processes for requirements approval. • Draft requirements for integrations for requirements approval.	R/A	C/I
	Requirements approval and sign-off by Client prior to Strada commencing design of the integration.	C/I	R/A
	Create integration design documents for Strada-owned or integrations designated as Shared-development • For integrations designated as Shared-development, execute design walkthrough with Client.	R/A	C/I
	Identify and migrate PPD integrations from Strada PPD tenant to Client tenant	R/A	I

	Build and Unit Test Integrations Strada-owned • Any Strada-owned integration will be developed, and unit tested by Strada.	R/A	I
	Build and Unit Test Client-owned or Shared-development Integrations • Any Shared-development or Client-owned integrations will be developed, and unit tested by Client.	I	R/A
	Issue Resolution • Strada may request additional information on integrations during development and unit testing.	R/A	C/I
	Schedule Knowledge Transfer for Strada-owned Integrations for Testing	R/A	C/I
	Execute Knowledge Transfers of Strada-owned integrations for Testing	R/A	C/I
	Perform Integration Migration to Testing Tenant	R/A	I
HCM Custom Reporting Fit/Gap	Conduct initial Fit/Gap analysis for each report in report inventory	R/A	C/I
	Conduct reporting discovery workshop	R/A	C/I
	Conduct weekly working sessions to review Fit/Gap results to define custom report needs, hours effort estimates, and priority. Report design is not included.	R/A	C/I
	Client provides approval of list of custom reports from working sessions to be added to project scope, as appropriate.	C/I	R/A
	Strada provide reporting questionnaire and conduct walkthrough with Client	R/A	C/I
HCM Custom Reporting Pool	Client provides completed reporting questionnaire	I	R/A
	Conduct reporting requirements deep-dives	R/A	C/I
	Draft requirements for Strada-owned custom reports and provide to Client	R/A	C/I
	Client provides custom report requirements approval prior to Strada commencing build of the Strada-owned reports	C/I	R/A
	Build and unit test Strada-owned custom reports	R/A	C/I
	Build and unit test Client-owned custom reports	I	R/A
	Conduct weekly Client-owned custom report build support meeting, as required	R/A	C/I
	Perform migration of Strada-owned custom reports to testing tenant	R/A	C/I
	Perform migration of Client-owned custom reports to testing tenant	C/I	R/A
FIN Custom Reporting Fit/Gap	Conduct initial Fit/Gap analysis for each report in report inventory. Fit/Gap working session(s) include the following: • Review of each report to determine if it's a Delivered, POV, or Custom Report • Any modifications to the Delivered or POV reports will be a Custom Report	R/A	C/I
	Conduct reporting discovery workshop	R/A	C/I

	Conduct weekly working sessions to review Fit/Gap results to define custom report needs, hours effort estimates, and priority. Report design is not included.	R/A	C/I
	Client reviews delivered reports from Fit-Gap to determine if they meet requirements.	C/I	R/A
	Client provides approval of list of custom reports from working sessions to be added to project scope, as appropriate.	C/I	R/A
FIN Custom Reporting Pool	Conduct reporting requirements deep-dives	R/A	C/I
	Draft requirements for Strada-owned custom reports and provide to Client	R/A	C/I
	Client provides custom report requirements approval prior to Strada commencing build of the Strada-owned reports	C/I	R/A
	Build, unit test and E2E test Strada-owned custom reports	R/A	C/I
	Build, unit test and E2E test Client-owned custom reports.	I	R/A
	Schedule knowledge transfer of Strada-owned custom reports	R/A	C/I
	Perform migration of Client-owned custom reports to testing tenant	C/I	R/A
Conversion	**Conduct Conversion Discovery workshop** • Strada will run a series of meetings to define scope, walk through the conversion extract templates and outline the conversion file delivery schedule.	R/A	C/I
	Create Conversion Strategy document • Document that details the data conversion approach and strategy for the project.	R/A	C/I
	Build Conversion extracts	C/I	R/A
	Deliver Conversion extract files	C/I	R/A
	Review of initial draft of Conversion extract files • Strada will review all draft conversion extract files and provide feedback to Client on what data has errors and what data does not meet standards.	R/A	C/I
	Perform Configuration Tenant Conversion	R/A	C/I
	Conduct Configuration Tenant Data Validation kickoff • Strada will facilitate an onsite session to walk Client through data conversion errors and provide a suite of reports to assist in data validation.	R/A	C/I
	Perform Configuration Tenant Data Validation • Client to execute a series of tasks to validate data and either confirm correctness or identify changes for next prototype.	C/I	R/A
Production Preparedness	**Conduct** Production Preparedness Workshop #1 • Review Support Model • Review Governance Support Model	R/A	C/I
	Conduct Production Preparedness Workshop #2 • Review Planned Support Resourcing • Review Governance examples	R/A	C/I

Testing – Essential with Automation	Draft, present, and refine Test Strategy	R/A	C/I
	Review, socialize, provide feedback, approve final Test Strategy	C/I	R/A
	Draft Configuration Unit Test Plan	R/A	C/I
	Deliver Configuration Unit Test Plan workshop	R/A	C/I
	Review and update Unit Test baseline scenarios by 1) replicating scenarios as needed to support testing of unique requirements by country, or business process differences defined in Architect workbooks and 2) assigning testers. Provide final version to Strada to load to Test Management tool (Jira)	C/I	R/A
	Ensure all Unit testers take Workday training	C/I	R/A
	Set-up Jira dashboards & reporting	R/A	C/I
	Load Unit Test scenarios to Jira	R/A	C/I
	Provide Unit Test Jira access and training to testers	R/A	C/I
	Prepare, refine and present Unit Testing kickoff in coordination with Client Testing Lead	R/I	A/C
	Attend Customer Confirmation Sessions	C/I	R/A
	Log and track Customer Confirmation Session issues in Jira	C/I	R/A
	Coordinate Unit testing logistics, meeting rooms, conference call details	C/I	R/A
	Deliver Unit Test execution kick-off and Jira training in joint coordination between Strada and Client testing Leads	R/I	A/C
	Execute Unit Testing	C/I	R/A
	Facilitate periodic Unit Test progress and bug review meetings as needed	C/I	R/A
	Attend and support Unit Test progress and bug review meetings as needed	R/A	C/I
	Log Unit Test results and bugs in Jira	C/I	R/A
	Resolve Unit Test bugs logged in Jira	R/A	C/I
	Support test teams with Unit Test bug logging & escalations	R/A	C/I
	Provide Unit Test metrics and reports	R/A	C/I
	Prepare and deliver Unit Test Exit Workbook for sign off	R/A	C/I
	Review Unit Test Exit Workbook and Sign off on Unit Testing	C/I	R/A
	Deliver End to End Test Plan workshop	R/A	C/I
	Provide End-to-End Planning and baseline scenarios	R/A	C/I
	Review automation End-to-End Test scenarios	C/I	R/A
	Finalize manual End-to-End Test scenarios	C/I	R/A
	Prepare data mining and staging of End-to-End Test population	C/I	R/A
	Data mine and stage End-to-End Test population	R/A	C/I

	Draft User Readiness Plan (optional)	C/I	R/A
	Ensure all End-to-End testers take Workday training	C/I	R/A
	Load End-to-End Test scenarios to Jira	R/A	C/I
	Provide End-to-End Jira access and training to testers	R/A	C/I
	Prepare, refine and present End to End Testing kickoff in coordination with Client Testing Lead	R/A	C/I
Testing – Essential (Integration)	Build and deliver Integration test plan	R/A	C/I
	Build and deliver Integration tracker schedule	C/I	R/A
	Prepare for Integration Test kickoff meetings	C/I	R/A
	Conduct Integration Test kickoff meetings	C/I	R/A
	Kick off Integration Testing approach with vendors and customer internal resources	C/I	R/A
	Build and finalize Integration Test scenarios	C/I	R/A
	Prepare for Integration Test planning meetings	C/I	R/A
	Conduct Integration Test planning meetings	C/I	R/A
	Load Integration Test scenarios to Jira	R/A	C/I
Change Management – Lead and Execute	**Impact Analysis** • Develop an organized approach to identifying key variations from current state to future state, including socialization of the process to targeted Client SMEs. Changes may be technical, policy, process, cultural, or organizational in nature. • Facilitate the activity, review impacts for clarity ***Note:*** *The Impact Analysis is a living document that will be maintained throughout the course of the program.*	R/A	C/I
	Impact Analysis • Identification of SMEs to capture change impacts from current state to future state Change impact collection	C/I	R/A
	End-User Communication and Engagement Plan • Organized series of communication campaigns designed to build organizational alignment and readiness. • Identification of specific deliverables, audiences and timing. Begin development/execution of up to 25 enterprise communication tactics to core audiences.	R/A	C/I
	End-User Communication and Engagement Plan • Develop targeted communications to non-enterprise/localized audiences. • Facilitate engagement events. • Review, approve, and distribute communications.	C/I	R/A

	Change Network Plan • Plan to engage with identified change network on a recurring basis • Includes development of up to 5 sets of materials to support Change Network activities	R/A	C/I
	Change Network Plan • Identification of participants. • Management of change network events and activities, including facilitation.	C/I	R/A
	End-User Training Deliverable Plan • Organized series of training deliverables designed to facilitate successful adoption of new ways of working. • Identification of specific deliverables (by enterprise audience) including content development timeline and Strada/Client developer assignments. • Finalize design of templates.	R/A	R/C
	Measurement: Business Readiness Execution • Readiness measurement occurs via mid-project and pre-Live Date assessment, plus post Live Date adoption assessment. • Development of pulse surveys, review of findings and strategic recommendations.	R/A	C/I
	Measurement: Business Readiness Execution • Deploy business readiness activities, adoption pulse surveys.	C/I	R/A
	Sustainment Strategy • Approach to ensuring the organization is ready to sustain change over time and prepared for ongoing tool releases. • Includes counsel on Workday-provided support resources.	R/A	R/C

Test			
Workstream	**Key project tasks & deliverables**	**Strada**	**Client**
Project Governance	**Create Cutover plan** • Plan that contains detailed steps for deploying the Workday Service to production.	C/I	R/A
Functional	**Build End-to-End Tenant** • Configuration (End-to-End) Tenant build based on the information collected in the Architect & Configure stage. • This build includes configuration data and full worker data provided by Client in the Data Gathering workbooks.	R/A	C/I
	Conduct End-to-End Test (End-to-End Tenant) Testing • The Client team is responsible for validating its accuracy using the Requirements documentation as a point of reference.	C/I	R/A
	Payroll Lead build Parallel Test Tenant and configure Payroll Parallel comparison tools.	R/A	C/I

	Test Lead updates Jira gadget for tracking Payroll Parallel defects	R/A	C/I
	Provide the appropriate HR, Benefits, Time and Absence Data and all other Payroll legacy data required for the compare.	C/I	R/A
	Perform data entry (Manual, EIB, Inbound, Integrations) to support payroll processing, including any catch-up transactions required to complete subsequent payroll comparison cycles.	C/I	R/A
	Execute integrations, as needed, including performing validation of the integration output files (comparison of Workday and Legacy production systems).	C/I	R/A
	Payroll Lead Execute the comparison process using Strada's custom payroll comparison tools for all cycles until acceptable tolerance levels have been met.	R/A	C/I
	Payroll Lead provide Gross to Net payroll comparison results reporting including Gross, Earnings, Deductions, and Taxes tolerances, acceptable and known differences.	R/A	C/I
	Research any differences and log defects as appropriate in Jira	C/I	R/A
	Payroll Lead schedule, coordinate, and facilitate periodic Payroll Parallel defect review meetings, as necessary.	C/I	R/A
	Payroll Lead resolve Parallel defects logged in Jira	R/A	C/I
	Payroll Lead support Payroll Parallel Testing Escalations	R/A	C/I
	Payroll Lead prepare Delivery Assurance Artifacts	R/A	C/I
	Payroll Lead prepare Sign-Off materials	R/A	C/I
	Sign off Parallel Testing (approved ready for Production)	C/I	R/A
Integration	Kick off Integration Testing Approach with vendors and customer internal resources.	R/A	C/I
	Conduct Integration Test Planning Meetings	C/I	R/A
	Execute and Test integrations	C/I	R/A
	Prepare and present metrics on Integration Test progress	C/I	R/A
	Support test teams with issue logging/escalation	R/A	C/I
	Sign off each Integration (approved ready for Production)	C/I	R/A
HCM Custom Reporting Pool	Client conduct report testing	C/I	R/A
	Support Client testing and provide troubleshooting assistance for Strada-owned custom reports.	R/A	C/I
	Conduct weekly Client-owned custom report testing support meeting, as required.	R/A	C/I
	Client to provide approval that testing is complete	I	R/A
FINS Custom Reporting Pool	Client conduct report testing	C/I	R/A
	Support Client testing and provide troubleshooting assistance for Strada-owned custom reports.	R/A	C/I
	Conduct weekly Client-owned custom report testing support meeting, as required.	I	R/A
	Client to provide approval that testing is complete	I	R/A

Conversion	**Perform Tenant Conversion** • Repeat the conversion activities identified in Architect & Configure to create the End-to-End Tenant and Parallel Tenant.	R/A	C/I
Close	Provide Jira exports of all Functional and Integration Program Test scenarios with steps, and bugs for audit tracking.	R/A	C/I
Production Preparedness	Conduct Production Preparedness Workshop #3 • Review resourcing and identify gaps • Review Governance Support Model and identify gaps • Wrap up production preparedness	R/A	C/I
Testing - Essential with Automation	Attend Tenant Handoff sessions	C/I	R/A
	Prepare, refine and present End-to-End Testing kickoff in coordination with Client Testing Lead.	R/I	A/C
	Coordinate End-to-End Testing logistics and day-to-day testing activities including regularly scheduled bug calls.	C/I	R/A
	Execute automated End-to-End test scenarios	R/A	C/I
	Execute manual End-to-End test scenarios (a selected portion of the E2E testing volume ensuring the client is prepared to sign off and operate at Go-Live).	C/I	R/A
	Support End-to-End Testing escalations	R/A	C/I
	Facilitate periodic End-to-End Testing progress and bug review meetings as needed.	C/I	R/A
	Attend and support End-to-End Testing progress and bug review meetings, as needed.	R/A	C/I
	Log manual End-to-End Test results and bugs in Jira	C/I	R/A
	Resolve End-to-End bugs logged in Jira	R/A	C/I
	Provide End-to-End Test metrics and reports	R/A	C/I
	Review, evaluate, and approve automation End-to-End testing results	C/A	R/I
	Complete User Readiness (optional)	C/I	R/A
	Prepare End-to-End Testing Exit Workbook for sign off	R/A	C/I
	Sign-off manual and automation End-to-End Testing (approved ready for Production).	C/I	R/A
Testing – Essential (Integration)	Conduct Integration testing meetings	C/I	R/A
	Data stage for Integration testing	C/I	R/A
	Execute Integration testing	C/I	R/A
	Log Integration test results and bugs in Jira	C/I	R/A
	Provide Integration Test metrics and reports	C/I	R/A
	Support test teams with bug logging/escalation	R/A	A/C
	Sign off each Integration (approved ready for Production)	C/I	R/A
Close	Provide Jira export of project tests and bugs	R/A	C/I

Change Management – Lead and Execute	**End-User Training Materials** Development of training materials to build proficiency, enable adoption; includes up to: • 35 job aids • 1 microlearning video • 1 concept deck	R/A	C/I
	End-User Training Deployment & Logistics Plan • Determine training deployment approach, course sequencing, and delivery schedule. • Determine strategy for storage and access to end-user training materials (e.g., LMS, intranet site, etc.). • Manage training logistics (e.g., distribution of meeting invitations, registration, conference room scheduling, participant tracking, post training follow-ups, etc.).	C/I	R/A
	Train-the-Trainer/Instructor-Led Training • Development of presentation-style materials focused on Live Date key concept and process changes; includes speakers notes.	R/A	C/I
	Measurement: Adoption Measurement Plan • Identify key metrics across Workstreams to measure post Live Date adoption.	R/A	R/C
	Measurement: Adoption Measurement Plan • Implement measurement plan post go-live.	C/I	R/A
	Sustainment Strategy • Approve and implement Sustainment Strategy.	C/I	R/A

Deploy			
Workstream	**Key project tasks & deliverables**	**Strada**	**Client**
Project Governance	**Live Date checklist**	R/A	C/I
Functional	Facilitate Knowledge Transfer	R/A	C
	Build Tenant • The final configuration and full data conversion load into the Pre-Production Tenant in preparation for Production.	R/A	C
	Pre-Production Tenant • Verify Client has reviewed and approved all data converted into Pre-Production Tenant. • Perform any manual configuration changes.	R/A	C
	Client to enter Catch-up Transactions in Production.	C/I	R/A
	Validate Pre-Production Tenant • Client will complete final validation and provide sign off that all Configuration and Worker Data Conversion has been completed in the Pre-Production Tenant.	C/I	R/A
	Manage Project Cutover Plan	C/I	R/A

	Transition to Production Services	C/I	R/A
	Provide Cutover Support	R/A	C
Integrations	Schedule Knowledge Transfer for Strada-owned Integrations for Production Transition.	C/I	R/A
	Execute Knowledge Transfers of Strada-owned integrations for Production Transition.	R/A	C/I
	Confirm Integration Cutover plan dates.	C/I	R/A
	Perform Integration Migration to Production Tenant	R/A	C/I
	Production Support for Strada-owned Integrations	R/A	C/I
	Production Support for Client-owned and Shared-development integrations	I	R/A
	Run Strada transitionary integration and share results with client team	R/A	I
	A catalog extract of integrations containing schedule and contact details to be used for Deploy planning.	R/A	C/I
HCM Custom Reporting Pool	**Schedule and execute knowledge transfer of Strada-owned custom reports for production transition**	R/A	C/I
	Perform migration for Strada-owned custom report to production tenant	R/A	C/I
	Perform migration for Client-owned custom report to production tenant	C/I	R/A
	Production support for Strada-owned custom reports	R/A	C/I
	Production support for Client-owned custom reports	I	R/A
FINS Custom Reporting Pool	**Perform migration for Strada-owned custom report to production tenant**	R/A	C/I
	Perform migration for Client-owned custom report to production tenant	C/I	R/A
	Production support for Strada-owned custom reports.	R/A	C/I
	Production support for Client-owned custom reports.	I	R/A
Conversion	**Perform Tenant Conversion** • Repeat the conversion activities identified in Architect & Configure for the final tenant.	R/A	C/I
Testing	Provide Jira exports of all Functional and Integration Program Test scenarios with steps, and bugs for audit tracking (Note: no screenshots or attachments are included in the Jira export.).	R/A	C/I
Change Management – Lead and Execute	**End-User Training Materials** Deployment of end-user training materials for individual, just-in-time use.	R/A	C/I
	Train-the-Trainer/Instructor-Led Training Co-facilitation of series of train-the-trainer/instructor-led training sessions for target audience(s).	R/A	C/I
	Train-the-Trainer/Instructor-Led Training Co-facilitation of series of train-the-trainer/instructor-led training sessions for target audience(s), coordination of logistics, etc.	C/I	R/A

Recurring			
Workstream	**Key project tasks & deliverables**	**Strada**	**Client**

Project Governance	Project plan maintenance • Review project plan	R/A	C/I
	Weekly status meetings/reports	R/A	C/I
	Participate in monthly Executive Committee meeting	R/A	C/I
	Conduct monthly Executive Committee meeting	C/I	R/A
	Own Risk Management Log	R/A	C/I
	Own Issue Management Log	R/A	C/I
	Own resolution of Client-owned issues	C/I	R/A
	Coordinate Delivery Assurance activities	R/A	C/I

Exhibit A: Strada Tools and Functions Served

Function Served	Tool Name	Technology Used	Notes
Project Governance and Collaboration	**Client Project Hub**	**Smartsheet**	• Client Project Hub allocated in Smartsheet upon signing of agreement • All project controls originate from project hub, including project plan, issues log, workstream breakout information, and status reporting • Personally Identifiable Information (PII) cannot be used on the Project Hub • Use of additional project management controls or tools will require change request
Document Sharing and Document Library	**Client Project Hub**	**Smartsheet**	• Document Library created as part of project hub allocated upon signing of agreement • Personally Identifiable Information (PII) cannot be used on in the Document Libraries • Use of additional document libraries or document repositories will require change request
Meeting Collaboration Technology	**Microsoft Teams**	**Microsoft Teams**	• Strada Microsoft Teams will be used for meeting administration • Instant Messaging currently only available for Strada internally; if required, Strada will consider alternatives • Changes to meeting collaboration approach requires change request

Data Validation	**Strada Data Conversion Accelerator**	**Proprietary**	• Data Validation is performed by Strada Data Conversion Accelerator and provides rapid Internal Review of data • Data Validation is non-cloud based and cannot execute in a Virtual Desktop Instance (VDI) environment • Use of VDI, additional Data Validation technologies, or additional data quality management (DQM) tools will require a change request
Integrations Requirements	**Strada Development Catalog**	**Proprietary**	• Integration requirements and integrations status tracked in Strada's proprietary Strada Development Catalog • Use of Strada Development Catalog is endemic throughout Strada project lifecycle and expediting integrations development • Use of alternate integration requirements gathering mechanisms will require a change request
Security Data Transfer	**Strada MFT / Move IT**	**Proprietary**	• Sensitive data that includes PII will be transferred between the client and Strada using Strada's Managed File Transfer (MFT) tool • Use of alternative or additional MFT tools will require a change request
Configuration Unit Test Tracking and End-to-End (E2E) Test Tracking	**Strada JIRA Instance**	**Atlassian JIRA**	• Test tracking will be performed in Strada's instance of JIRA • Strada's testing and implementation methodology for Test phases is deeply connected with use of the JIRA tool • Use of alternative or additional Testing tools will require a change request
Parallel Comparison Tool	**Strada Payroll Parallel Comparison Tool**	**Proprietary**	• Test tracking will be performed in Strada's instance of JIRA • Strada's parallel payroll approach deeply connected with use of the internal parallel comparison tool • Workday's PROVE tool will not be used • Use of additional parallel comparison tools will require a change request

Project Tool	**Hardware**	**Client Laptops**	If applicable, • Onboarding: Client laptops must be delivered to Strada local office per each resource onboarded to the project • Compatibility: Strada WD tools must have load permissions into the client laptop, e.g., Strada Data Conversion Accelerator, payroll parallel comparison • Productivity and Efficiency: Strada will not use client email or messaging tool • Technical Support: The client must provide technical support for their laptop • Ownership and responsibility: Strada is not responsible for damaged hardware • Licensing: The client is responsible for software licensing needed for the Project • Exit: The client covers shipping costs for all laptop resources and the removal process of all Strada proprietary tools.
Project Tool	**Hardware**	**VPN**	• Strada uses a secure method of logging into Strada system through VPN • Strada team cannot access tools that house client-specific data without logging in through VPN • Use of client VPN will require a change request and could potentially impact the timeline

Exhibit B: Program Management Overview – Strada Workday and SpryPoint Work Order implementation

Program Structure

The purpose of this document is to outline how Strada will manage the Workday and SpryPoint deployments at the PMO level to support overall program status, escalations, key roles and tools. Strada and SpryPoint will follow a separate methodology for system implementation as per each implementer's Statement of Work.

The implementation services provided by Strada and SpryPoint will each be referred to as a "project" and as such each project shall have a Vendor Project Manager to manage the day to day of these projects. Both the Strada and SpryPoint Project Manager will report into the Strada Program Executive to support program reporting and program meetings. Strada will service as the Program Manager for both projects and will serve as the escalation point for issues arising from both the Workday and SpryPoint implementations.

The Program Management Team which consists of the Strada Program Executive, the Strada Project Manager and the SpryPoint Project Manager working in conjunction with the Client Project Manager and will compile status reports for distribution to both the Client, Strada and SpryPoint management. Weekly/monthly meetings will be held to review overall status, schedule, and open issues noted in the monthly status report.

As the implementation experts Strada and SpryPoint, agree to communicate clearly which issues/tasks are on the critical path and have immediate impact on the project schedule and which issues/tasks are not. For issues that are not on the critical path, the Strada /SpryPoint Program Management Team will monitor these to ensure that these do not become critical path issues/tasks.

Project Administration

1. The Strada Program Executive will serve as the escalation point for issues arising from both the Workday and SpryPoint implementations.
    a. The Strada Project Manager will be responsible for management of Strada owned tasks and responsibilities.
    b. The Client Project Manager will be responsible for management of Client owned tasks and responsibilities.
    c. The SpryPoint Project Manager will be responsible for management of SpryPoint owned tasks and responsibilities.
2. The Strada and SpryPoint Project Managers will be responsible for scheduling and setting the agenda for the project status meetings, not to exceed 60-minutes.
3. The Strada and SpryPoint Project Managers will act as the representative of the Strada and SpryPoint teams for the project status meeting. Additional Strada and SpryPoint personnel will attend the status meeting based on the health of the project, timeline, workstream health or cross-functional escalations. The Project Managers will ensure the status report is updated prior to the status meeting.
4. Strada, SpryPoint and Client resources will be responsible for maintaining the project RAID log, located on Strada's Smartsheet workspace – **'Project Hub'**. The client project manager will be responsible for following up on Client-owned issues as indicated on the RAID log.
5. Client shall permit and arrange for access to Client records requested by Strada and SpryPoint that are reasonably necessary to perform the Services under their respective SOWs.
6. Client will utilize Strada and SpryPoint's respective tools, templates, methodologies, and practices for deployment, including but not limited to: 1) project work repositories; 2) data storage; 3) test management; and 4) integrations tracking. A baseline inventory of tools and their purpose is included in the SOW. Any deviation from the standard tool set that is required by Client will be subject to a Change Order to address Strada 's and SpryPoint's additional effort and costs associated with using the non-standard tool(s). Strada tools usage includes but is not limited to the tools identified in Exhibit A.
7. Client is responsible for all aspects Executive Committee meeting including but not limited to scheduling, agenda creation, presentation, and meeting execution. Only the aligned Strada and SpryPoint Project Manager, Executive Sponsor and/or Program Executive will attend.
8. Strada will own the vendor relationship for all integrations interacting between Workday and SpryPoint.

PMO Roles

Program Executive – Strada Role

Manages the overall delivery of the Workday and SpryPoint deployment using appropriate frameworks and collaborating with sponsors to manage scope and risk. Drives continued success by managing service quality and cost and leading delivery. Measures and communicates progress to leadership within committed time frames and budget.

Responsibilities Include:

- ✓ Looking for and resolving any issues that might hinder the systems' development.
- ✓ Taking under control any risks and dependencies.
- ✓ Managing team structure and assigning people to teams.
- ✓ Ensuring the iterative process on deliverables when necessary.
- ✓ Ensuring smooth communication between the client, Strada and SpryPoint team.
- ✓ Overseeing the projects' timelines and budgets.

Project Managers– Strada and SpryPoint Roles

Responsible for overseeing the planning, execution, and delivery of Workday and SpryPoint deployments, respectively. Collaborate with cross functional teams to ensure project success. Monitor project progress and provide regular status updates to the Program Executive and stakeholders. Consistent communication between both project managers to remove any roadblocks during deployment that have impacts to both systems. Ensure project deliverables meet quality standards and stakeholder expectations.

Responsible to ensure implementations follow the respective the end-to-end implementation methodology , including analysis and business requirement configuration, implementation, testing and support. Lead the effort to design, build and configure applications, acting as the primary point of contact. Focused on assisting the team in pushing projects forward more quickly by removing roadblocks.

Responsibilities Include:

- ✓ Managing project timelines, budgets, and resources, as well as ensuring project quality and stakeholder satisfaction
- ✓ Develop and maintain detailed project plans, schedules and PMO meetings
- ✓ Maintain Project Hub with risks, actions, key milestone dates and any changes to scope
- ✓ Identify and manage project risks and issues

Key Project Roles

Strada Technical Architect and/or Integration Lead
Responsible for readiness and scope confirmation for integrations, reporting, data conversion and

automated data transfer between Workday and SpryPoint. Accountable for any escalations in the technical workstreams.

Additional roles are outline in the individual Statements of Work.

PMO Playbook

Tools

- Project Hub
- Meeting Collaboration Tools
    - Strada- MS Teams
    - SpryPoint- Zoom
- Secure File Transfer Protocol
    - Strada- (defined in the respective SOW)
    - SpryPoint (defined in the respective SOW)

Tracking and Status

Project Plans – Project Hub

Detailed project plans for Strada and SpryPoint are to be loaded into Strada's Project Hub tool. This includes:

1) Project timelines and budgets
2) Resource tracker
3) Deliverables/activity per phase and SKU and/or Area
4) Key milestones and dates per deliverable/activity by owner
5) Highlight critical touchpoints/dependencies by systems and activities, configuration and resources involved
6) Project Governance Strategy

RAID Logs – Project Hub

All risks, assumptions, issues and dependencies for the dual deployment must be added to the RAID log in Project Hub. The Raid log is to be updated/maintained by Functional/Technical leads and managed by the Strada and SpryPoint project managers. RAID items per functional area are to be tracked and reviewed during the Weekly PMO call with the client.

Change Orders – Project Hub

Any change orders for Strada and/or SpryPoint must be documented and approved by the client in Project Hub.

Cutover Plan – Project Hub

Detailed cutover plans must be documented and maintained in Project Hub.

Key Project Meetings

PMO Status Meeting

Weekly Attendees:

- Program Executives (Client, Strada)
- Project Manager (Client, Strada)
- Project Leads (Client, Strada)

Bi-weekly Attendees:

- Program Executives (Client, Strada and SpryPoint)
- Project Manager (Client, Strada and SpryPoint)
- Project Leads (Client, Strada and SpryPoint)

Topics:

PMO activities

- Project status/health
- Timeline
- Prior week progress summary per area
- Key activities, system dependencies and touchpoints for the next 3-month timeline

Functional/Technical Areas

- High-level status per functional/technical area
- Current week objectives
- Key milestones by dates and progress
- RAID items
- Status/health per area based on resources, timeline and deliverables

Functional/Technical Meetings by scope

Attendees:

- Project Leads (Client, Strada and SpryPoint)
- Consultants (Client, Strada and SpryPoint)
- SMEs (Client, Strada and SpryPoint)

- PM's as needed (Client, Strada and SpryPoint)

Topics:

- Occurs multiple times per week based on project phase and deliverables
- Review scope, activities, configurations, risks, successes, upcoming deliverables, deliverables past due if applicable, key dates and status
- Issue Resolution

Executive Meeting – Monthly, or as requested by Client

Attendees**:**

- Client Sponsors/Leadership
- Program Executives (Client, Strada and SpryPoint)
- Project Managers (Client, Strada and SpryPoint)

Topics:

- Project updates, milestones and key deliverables
- Review critical risks/challenges impacting project deliverables and timeline
- Review any open change orders that require approval

Glossary of Terms and Baseline Assumptions

Cloud Service

For purposes of this SOW, "Cloud Service" means the cloud-based software services provided to Client pursuant to a separate and independent agreement between Client and the provider of such cloud-based software services, which will be accessed by Strada in connection with providing the Services. Client shall obtain any licenses and authorizations relating to the Cloud Service to the extent necessary to enable provision of the Services. Strada's service offering is predicated on using the Cloud Service and any references to the "system" and "platform" herein shall refer to the Cloud Service unless the context clearly indicates otherwise. Client business processes will be implemented within the Cloud Service's configuration options.

Deliverables

For the purposes of this SOW, "Deliverables" shall mean any configurations of, reporting functionality for data from, and integrations to/from the Cloud Service that are specific to, and created and delivered solely and exclusively for, Client by Strada (determined without regard to any references to "deliverable" in other sections of this SOW).

Baseline Assumptions

1. For purposes of this SOW, Workday is the Cloud Service. Only functionality that is available with the current commercially available Workday release at the reservation date can be considered for

deployment. Changes to the Workday Release will be assessed by the Client and Strada PMO for fit into the current project timeline for deployment.

2. Client is responsible for the user experience including but not limited to manager and employee training and user enablement.
3. Except where noted explicitly in the Functional Configuration Parameters described herein:
    a. WD Setup will be the baseline for configuration,
    b. WD Setup provides a robust, preconfigured role-based and user-based security group structure. Client will map responsibilities to delivered security groups, with no need for changes to existing structure or creation of custom security groups or roles.
    c. Strada will enable delivered security for all Workday standard reports related to the SKUs listed in section II, Project Overview / Background.

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Increased Functional Scope	Price Change
Sku	
FINS DC: Assets (5k --> 13k assets +30) Procurement (100->500 POs +50)	**$ 7,630.00**
New SKU FINS DC (Expenses, Grants)	**$ 9,940.00**
HCM additions	**$ 31,610.00**
Added Workday Skus	
Inventory	**$ -**
Expenses	**$ 40,000.00**
Grants	**$ 72,150.00**
PRISM (4 use cases)	**$ 24,210.00**
People Experience: Journey & Help	**$ 23,500.00**
Messaging (Phase 2)	
Candidate Engagement	**$ 12,000.00**
Removed Workday Skus	
Timeline Extension	
Integrations Change	
FINS Feb 19 and March 13 updates	**$ 23,980.00**
HCM Feb 19 and March 13 updates	**$ 46,870.00**
Additonal Services	
Data Extraction	**$ -**
Data Preprocessing/ Transformation (pricing is in the original estimate)	**$ -**
Integration Test Management (50 integrations)	**$ -**
Contengency Scope	
Travel Estimate	**$ 300,000.00**
	$ 591,890.00

Original Price phase 1a	$	2,548,510.00
Difference with RFP worksheet	$	(4,630.00)
New BAFO Price Phase 1a	$	3,135,770.00
Travel Contingency	*$*	*300,000.00*
Net Increase	$	587,260.00
ph 1b - adaptive	$	208,930.00
phase 2 (messaging)		13,530.00
grand total including travel	$	3,358,230.00
Strada net total	$	3,058,230.00

CITY OF IDAHO FALLS:

ERP Software and Implementation Services Contract and SOW Development, Project Quality Assurance, and Testing Support

WCG STATEMENT OF WORK

VERSION 1.0

1.0 Project Overview

1.1 Project Summary

The City of Idaho Falls (the City) has an initiative to replace its Enterprise Resouce Planning (ERP) system with a more modern, advanced solution that better integrates into the City's processes and will deliver increased internal efficiencies. To deliver on this initiative, the City is engaging with Whitlock Consulting Group (WCG) to support the contract negotiations, SOW development, and Project Quality Assurance.

This Statement of Work (SOW) encompasses all the activities required to deliver the above-mentioned tasks and has been divided into the following project phases:

1) Contract & SOW Development
2) Project Quality Assurance

2.0 WCG Project Responsibilities and Deliverables

Responsibility 1 – Contract and SOW Development

WCG will lead a critical Confirmation Process in which our team will work with the City and the selected vendors to confirm all critical requirements, pricing calculations, and project assumptions in order to remove any ambiguities / assumptions that may challenge the final SOW / contract documents.

Clearly defining expectations on the work that will be delivered and who will be doing what is paramount to a successful project. Several sessions will be conducted and coordinated by WCG with the selected vendors in order to come to a well-defined and agreed-upon Statement of Work for the project.

The Statement of Work is one component of the overall contracting package. WCG will work with the City's team, Purchasing and the selected vendors to determine the required contracting documents, required discussions / approvals and provide negotiating assistance to ensure that the City's best interests are always taken into account.

Deliverables:

Task #	Task Name	WCG Deliverable Details
1	**Contract & SOW Development**	*Requirement Confirmation (see below for details)*
		Pricing Confirmation - BAFO
		Assist with Statement of Work Development
		Assist with Contract Negotiations
2	**Requirement Confirmation**	*Confirm critical requirements with selected vendor(s)*
		Identify effects to and finalize project scope (including integrations)
		Identify effects to and finalize pricing

Responsibility 2 – Project Quality Assurance

WCG will provide a project executive to oversee progress, attend project status and executive steering committee meetings, provide early identification of risks, suggest mitigation options and leverage executive network, as needed to maintain project success and adherence to the approved timeline. This is a part-time service provided to the city (40 hours / month) and intended to support the City's project manager, Core team, and Executive Committee with high-level project oversight, included but not limited to, early identification of issues/risks that may impede project success. The exact nature of these services will be coordinated with the City's project manager and Executive Committee, and are subject to being modified as the project progresses and evolves from stage-to-stage.

Deliverables:

Task #	Task Name	WCG Deliverable Details
3	**Project Quality Assurance**	*Maintain pulse and oversee general project progress*
		Attend project status / ESC meetings
		Provide early identification of risks and mitigation options
		Escalate and leverage excutive network, as needed

2.0 WCG Deliverables Table

Task #	Task Name	WCG Deliverable Details	WCG Effort
1	**Contract & SOW Development**	*Requirement Confirmation (see below for details)*	80 hours
		Pricing Confirmation - BAFO	
		Assist with Statement of Work Development	
		Assist with Contract Negotiations	
2	**Requirement Confirmation**	*Confirm critical requirements with selected vendor(s)*	
		Identify effects to and finalize project scope (including integrations)	
		Identify effects to and finalize pricing	
3	**Project Quality Assurance**	*Maintain pulse and oversee general project progress*	40 hours / month (17 months)
		Attend project status / ESC meetings	
		Provide early identification of risks and mitigation options	
		Escalate and leverage excutive network, as needed	

3.0 Project Value

4.1 Consulting Effort & Value

WCG 2025 rate is $165 / hour for all consulting resources. The total number of WCG effort hours required by Task Number and the resulting value can be seen in the below chart:

Task #	Task Name	WCG Deliverable Details	WCG Effort	Consulting Effort
1	**Contract & SOW Development**	*Requirement Confirmation (see below for details)*	80 hours	$ 13,200
		Pricing Confirmation - BAFO		
		Assist with Statement of Work Development		
		Assist with Contract Negotiations		
2	**Requirement Confirmation**	*Confirm critical requirements with selected vendor(s)*		
		Identify effects to and finalize project scope (including integrations)		
		Identify effects to and finalize pricing		
3	**Project Quality Assurance**	*Maintain pulse and oversee general project progress*	40 hours / month (17 months)	$ 112,200
		Attend project status / ESC meetings		
		Provide early identification of risks and mitigation options		
		Escalate and leverage excutive network, as needed		

TOTAL LABOR HOURS:	760 hours
HOURLY RATE:	$165
TOTAL CONSULTING EFFORT:	**$125,400**
NUMBER OF TRIPS:	TBD
ESTIMATED WEEKLY TRAVEL COST:	TBD
TOTAL COST (NOT TO EXCEED AMOUNT):	**$125,400**

Any requests and/or additional tasks that are not included in the above scope will require an amendment or additional task authorization – complete with additional effort and cost estimations utilizing WCG's hourly rate.

4.2 Travel Expenses

If on-site travel is required, WCG will bill for actual travel expenses including the cost of coach flights, rental car + gas + parking, lodging, and a $75/day per diem. No travel costs have been built into the above consulting value.

5.0 Invoice and Payment Terms

WCG will provide invoices at the end of the month that will include any applicable monthly fixed fees and/or completed deliverables. A separate invoice will be delivered at the end of the months in which travel occurred and will include the components included in Section 4.2.

Payment terms for this contract will be Net 30.

I agree to the Statement of Work as listed herein:

Authorized signature Date
City of Idaho Falls

Print name

I agree to the Statement of Work as listed herein:

Authorized signature Date
Whitlock Consulting Group, LLC

Michael Whitlock
Print name

Please return to:

Michael Whitlock at mwhitlock@wcg-consulting.com

Memorandum

File #: 25-214 **City Council Meeting**

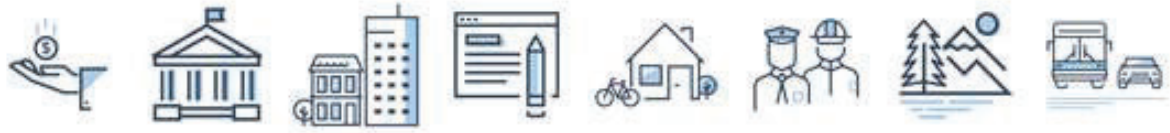
FROM: Chris H Fredericksen, Public Works Director
DATE: Wednesday, April 2, 2025
DEPARTMENT: Public Works

Subject
Bid Award - Storm Improvements - Oneida Avenue at Basalt Street, Lava Street and Hill Street
Council Action Desired

☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the plans and specifications; award to the lowest responsive, responsible bidder, Sunroc Corporation, dba Depatco, in the amount of $583,182.00; and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
On Thursday, March 20, 2025, bids were received and opened for the Storm Improvements - Oneida Avenue at Basalt Street, Lava Street and Hill Street project. The tabulation of bid results is attached. The purpose of the proposed bid award is to improve stormwater infrastructure along Oneida Avenue.

Alignment with City & Department Planning Objectives



☐ ☐ ☐ ☐ ☐ ☐ ☐ ☒

This project supports the community-oriented result of reliable public infrastructure by investing in the city's stormwater system.

Interdepartmental Coordination
Project reviews have been conducted with all necessary city departments to ensure coordination of project activities.

Fiscal Impact
Cost allocation for this project was budgeted from the Public Works Capital Improvement Fund and sufficient budget authority exists for completion of the proposed activities.

Legal Review
The Legal Department reviewed the bid process and concurred that the Council action complies with the requirements

of Idaho Code § 67-2805.

2-38-19-3-SDN-2024-27
2025-019

STORM IMPROVEMENTS
ONEIDA AT BASALT,LAVA & HILL
PROJECT # 2-38-19-3-SDN-2024-27

PROJECT LOCATION

MAYOR

REBECCA L. NOAH CASPER

CITY COUNCIL

MICHELLE ZIEL-DINGMAN
LISA BURTENSHAW
KIRK LARSEN
JIM FRANCIS
JOHN B. RADFORD
JIM FREEMAN

ENGINEERING DIVISION

PUBLIC WORKS DIRECTOR
CHRIS H FREDERICKSEN, P.E.

CITY ENGINEER
JON KNOWLES, P.E.

2025

PROFESSIONAL ENGINEER
REGISTERED
14787
03/06/2025
STATE OF IDAHO
JONATHAN W. KNOWLES

AS BUILT DATE / BY: ____ / ____	IDAHO FALLS PUBLIC WORKS
SCALE SHOWN IS FOR SHEET 11 x 17 ONLY	
ENGINEERING DIVISION	

STORM IMPROVEMENTS
ONEIDA AT BASALT, LAVA & HILL

CHECKED BY:	DESIGN TECH:	DATE PLOTTED:	SHEET NO.
CW	RS	3/6/2025	1 OF 8

F:\Projects\SDN\SDN-2024-27\Dwg\WTR-2024-27-Titlepage.dwg

City of Idaho Falls

Engineering Division

Engineer's Estimate

Project: Storm Improvements - Oneida at Basalt, Lava, & Hill ***Number:*** 2-38-19-3-SDN-2024-27

Submitted: Jon Knowles, P.E. ***Date:*** March 20, 2025

Reference Number	Description	Estimated Quantity	Unit	Engineer's Estimate		Sunroc Corp		Knife River Corporation		JM Concrete, Inc		4050 Development, LLC		HK Contractors, Inc	
				Unit Price	Total Amount	Unit Price	Total Amount	Unit Price	Total Amount	Unit Price	Total Amount	Unit Price	Total Amount	Unit Price	Total Amount
	DIVISION 200 - EARTHWORK														
201.4.1.D.1	Removal of Concrete	215	SY	$35.00	$7,525.00	$32.00	$6,880.00	$20.00	$4,300.00	$20.00	$4,300.00	$33.00	$7,095.00	$60.00	$12,900.00
201.4.1.E.1	Removal of Curb & Gutter	449	LF	$25.00	$11,225.00	$16.00	$7,184.00	$5.00	$2,245.00	$10.00	$4,490.00	$40.00	$17,960.00	$29.00	$13,021.00
201.4.1.F.1.a	Removal of Manhole	3	EA	$2,000.00	$6,000.00	$750.00	$2,250.00	$700.00	$2,100.00	$2,000.00	$6,000.00	$2,500.00	$7,500.00	$3,000.00	$9,000.00
201.4.1.F.1.b	Removal of Inlet Box	11	EA	$650.00	$7,150.00	$600.00	$6,600.00	$565.00	$6,215.00	$1,000.00	$11,000.00	$500.00	$5,500.00	$1,650.00	$18,150.00
201.4.1.F.1.c	Removal of Hydrant	1	EA	$1,500.00	$1,500.00	$2,400.00	$2,400.00	$800.00	$800.00	$3,000.00	$3,000.00	$750.00	$750.00	$4,100.00	$4,100.00
201.4.1.F.1.d	Removal of Tree	1	EA	$1,000.00	$1,000.00	$2,800.00	$2,800.00	$1,200.00	$1,200.00	$4,000.00	$4,000.00	$500.00	$500.00	$12,500.00	$12,500.00
202.4.1.A.1	Excavation	1243	CY	$30.00	$37,290.00	$35.00	$43,505.00	$32.00	$39,776.00	$20.00	$24,860.00	$92.00	$114,356.00	$55.00	$68,365.00
	DIVISION 300 - TRENCHING														
302.4.1.B.1	Rock Excavation	150	LF	$150.00	$22,500.00	$170.00	$25,500.00	$114.00	$17,100.00	$200.00	$30,000.00	$125.00	$18,750.00	$425.00	$63,750.00
307.4.1.A.7	Miscellaneous Surface Restoration (Natural Ground)	13	LF	$50.00	$650.00	$64.00	$832.00	$200.00	$2,600.00	$100.00	$1,300.00	$35.00	$455.00	$310.00	$4,030.00
307.4.1.F.1	Type "P" Surface Restoration (Asphalt Roadway)	795	LF	$100.00	$79,500.00	$110.00	$87,450.00	$100.00	$79,500.00	$300.00	$238,500.00	$62.00	$49,290.00	$145.00	$115,275.00
	DIVISION 400 - WATER														
401.4.1.A.1	Water Main Pipe – Size 8"	230	LF	$90.00	$20,700.00	$45.00	$10,350.00	$50.00	$11,500.00	$100.00	$23,000.00	$80.00	$18,400.00	$195.00	$44,850.00
404.4.1.B.1	Replace Water Service, Size 1"	1	EA	$3,500.00	$3,500.00	$3,200.00	$3,200.00	$4,200.00	$4,200.00	$3,000.00	$3,000.00	$2,100.00	$2,100.00	$7,500.00	$7,500.00
402.4.1.A.1	Valve – 8" Gate	3	EA	$1,500.00	$4,500.00	$1,500.00	$4,500.00	$1,195.00	$3,585.00	$500.00	$1,500.00	$1,300.00	$3,900.00	$1,025.00	$3,075.00
403.4.1.A.1	Hydrant	1	EA	$3,200.00	$3,200.00	$3,850.00	$3,850.00	$3,800.00	$3,800.00	$5,000.00	$5,000.00	$2,700.00	$2,700.00	$6,050.00	$6,050.00
	DIVISION 600 - CULVERTS & STORM DRAINS														
601.4.1.A.5.a	6" Storm Drain Pipe	30	LF	$80.00	$2,400.00	$70.00	$2,100.00	$84.00	$2,520.00	$100.00	$3,000.00	$115.00	$3,450.00	$265.00	$7,950.00
601.4.1.A.5.b	12" Storm Drain Pipe	945	LF	$110.00	$103,950.00	$70.00	$66,150.00	$90.00	$85,050.00	$90.00	$85,050.00	$108.00	$102,060.00	$113.00	$106,785.00
601.4.1.A.5.c	12" Storm Drain Pipe, C900	60	LF	$150.00	$9,000.00	$110.00	$6,600.00	$125.00	$7,500.00	$130.00	$7,800.00	$125.00	$7,500.00	$146.00	$8,760.00
601.4.1.A.5.d	24" Perforated Storm Drain Pipe	157	LF	$165.00	$25,905.00	$90.00	$14,130.00	$55.00	$8,635.00	$150.00	$23,550.00	$130.00	$20,410.00	$195.00	$30,615.00
602.4.1.A.1.a	Storm Drain Manhole Type A	1	EA	$7,500.00	$7,500.00	$6,500.00	$6,500.00	$6,000.00	$6,000.00	$6,000.00	$6,000.00	$6,300.00	$6,300.00	$7,625.00	$7,625.00
602.4.1.A.1.b	Storm Drain Shallow Manhole Type A	7	EA	$7,500.00	$52,500.00	$6,200.00	$43,400.00	$6,000.00	$42,000.00	$6,000.00	$42,000.00	$6,650.00	$46,550.00	$9,725.00	$68,075.00
602.4.1.F.1.a	Catch Basin – Type IV (2' X3')	4	EA	$5,000.00	$20,000.00	$3,800.00	$15,200.00	$5,351.00	$21,404.00	$2,000.00	$8,000.00	$5,125.00	$20,500.00	$4,600.00	$18,400.00
602.4.1.F.1.b	Catch Basin – Type IV (30" Diameter)	6	EA	$5,000.00	$30,000.00	$3,600.00	$21,600.00	$5,000.00	$30,000.00	$2,000.00	$12,000.00	$5,150.00	$30,900.00	$4,050.00	$24,300.00
	DIVISION 700 - CONCRETE														
706.4.1.A.7	Curb and Gutter, Type Standard	441	LF	$75.00	$33,075.00	$45.00	$19,845.00	$74.00	$32,634.00	$35.00	$15,435.00	$60.00	$26,460.00	$110.00	$48,510.00
706.4.1.E.1.a	Concrete Sidewalks, thickness 4"	133	SY	$180.00	$23,940.00	$120.00	$15,960.00	$145.00	$19,285.00	$60.00	$7,980.00	$108.00	$14,364.00	$235.00	$31,255.00
706.4.1.E.1.b	Concrete Sidewalks, thickness 5"	82	SY	$200.00	$16,400.00	$130.00	$10,660.00	$285.00	$23,370.00	$90.00	$7,380.00	$150.00	$12,300.00	$540.00	$44,280.00
	DIVISION 800 - AGGREGATES & ASPHALT														
801.4.1.A.1	6" Minus Uncrushed Aggregate Base	315	CY	$50.00	$15,750.00	$50.00	$15,750.00	$55.00	$17,325.00	$20.00	$6,300.00	$67.00	$21,105.00	$75.00	$23,625.00
801.4.1.C.1	Uncrushed Drain Rock 3 inches	894	CY	$80.00	$71,520.00	$80.00	$71,520.00	$68.00	$60,792.00	$60.00	$53,640.00	$72.00	$64,368.00	$100.00	$89,400.00
802.4.1.A.1	Crushed Aggregate for Base Type 1	206	CY	$75.00	$15,450.00	$60.00	$12,360.00	$82.00	$16,892.00	$80.00	$16,480.00	$56.00	$11,536.00	$105.00	$21,630.00
810.4.1.A.1	Plant Mix Pavement 3/4", PG 58-34	171	TON	$140.00	$23,940.00	$190.00	$32,490.00	$165.00	$28,215.00	$120.00	$20,520.00	$295.00	$50,445.00	$185.00	$31,635.00
	DIVISION 1100 - TRAFFIC SIGNALS & STREET LIGHTING														
1105.4.1.F.1	Remove and Replace Traffic Sign	3	EA	$1,000.00	$3,000.00	$2,000.00	$6,000.00	$2,000.00	$6,000.00	$500.00	$1,500.00	$1,250.00	$3,750.00	$2,000.00	$6,000.00
	DIVISION 2000 - MISCELLANEOUS														
2030.4.1.A.1	Manhole, Adjust to Grade	2	EA	$1,500.00	$3,000.00	$1,200.00	$2,400.00	$1,200.00	$2,400.00	$500.00	$1,000.00	$900.00	$1,800.00	$1,500.00	$3,000.00
2030.4.1.C.1	Valve Box, Adjust to Grade	1	EA	$1,000.00	$1,000.00	$800.00	$800.00	$1,090.00	$1,090.00	$500.00	$500.00	$500.00	$500.00	$1,000.00	$1,000.00
2050.4.1.A.1	Drainage Geotextile	1081	SY	$3.50	$3,783.50	$7.50	$8,107.50	$3.00	$3,243.00	$10.00	$10,810.00	$1.50	$1,621.50	$7.00	$7,567.00
2050.4.1.C.1	Subgrade Separation Geotextile, Type 2	1231	SY	$3.00	$3,693.00	$3.50	$4,308.50	$3.00	$3,693.00	$5.00	$6,155.00	$1.70	$2,092.70	$5.50	$6,770.50
	TOTAL				**$672,046.50**		**$583,182.00**		**$596,969.00**		**$695,050.00**		**$697,268.20**		**$969,748.50**

Memorandum

File #: 25-184 **City Council Meeting**

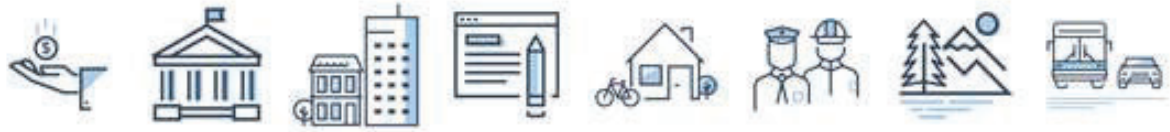
FROM: Bear Prairie, General Manager
DATE: Friday, March 7, 2025
DEPARTMENT: Idaho Falls Power

Subject
Idaho Falls Power Board Minutes - February 2025

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Idaho Falls Power Board Meeting Minutes from February 12, 2025 (or take other action deemed appropriate).

Description, Background Information & Purpose
The Idaho Open Meeting law requires the governing body of a public agency to record and make written minutes publicly available for all public meetings. These minutes comply with Idaho Code § 74-205.

Alignment with City & Department Planning Objectives



☐ ☒ ☐ ☐ ☐ ☐ ☐ ☐

The requested action supports good governance by demonstrating sound management and promoting trust and transparency.

Interdepartmental Coordination
n/a

Fiscal Impact
n/a

Legal Review
n/a

February 12, 2025 Unapproved

The Idaho Falls Power Board of the City of Idaho Falls met Wednesday, February 12, 2025, at the Idaho Falls Power Boardroom, 140 S. Capital, Idaho Falls, Idaho at 7:45 a.m.

Call to Order, Roll Call, and Announcements:

There were present:
Mayor Rebecca L. Noah Casper (arrived at 7:50 a.m.)
Council President Lisa Burtenshaw
Board Member Michelle Ziel-Dingman
Board Member Jim Francis
Board Member John Radford (joined via Zoom)
Board Member Jim Freeman
Board Member Kirk Larsen

Also present:
Bear Prairie, IFP General Manager
Stephen Boorman, IFP Assistant General Manager
Josh Roos, IFP Chief Financial Officer
Will Hart, Executive Director of Idaho Consumer-Owned Utility Association
Wid Ritchie, Customer Service Manager
Reese Lawley, Department of Energy Fellow Clean Energy Innovator
Jace Yancey, Operations Technology Manager
Alan Cunningham, Design Services Manager
Richard Malloy, Licensing and Compliance Manager
Catherine McClure Smith, Economic Development Administrator
Michael Kirkham, City Attorney
Linda Lundquist, IFP Board Secretary

Council President Burtenshaw called the meeting to order at 7:46 a.m.

Q4 Financial and Annual Reports

Chief Financial Officer (CFO) Roos reviewed the Charging and Fueling Grant specifics and explained the request for materials quotes process and how 17 proposals were graded and narrowed down to a top five for product demonstrations. Based on those outcomes, he said that final deliberations identified Blink as the top-scoring vendor to supply the chargers and cabinets. CFO Roos stated that location, installation, and timeline details will be shared in more depth in the next Board meeting. General Manager (GM) Prairie added that in addition to the $3,002,856 Federal grant awarded, Idaho Falls Power (IFP) is obligated to pay $750,714 as their portion and explained that he anticipates IFP will recoup those costs by charging electric vehicle customers for the charging service. He explained that he plans to offer low-cost rates compared to other area charging stations. Board Member Radford mentioned that while Federal contracts are being upheld, IFP is in a better position than other entities because IFP is not dependent on outside funding. He pointed out that while awarded, we continue to wait for the Office of Energy and Mineral Resource (OEMR) contract to come back for the downtown alleyway project as well as the Department of Transportation's Hydro Incentives Grant that will help to cover repair costs for the upper plant's leaking gates and additional piping.

CFO Roos reported on IFP's cash position and noted a bond proceeds draw toward the end of the year pushed up the cash. He pointed out that inventory has increased by $5 million because of capital projects. He explained that the large difference in fixed assets (liabilities) was from the $23 million transmission bond and added that the audited financial statement would show the revenue bonds split out correctly. GM Prairie stated that CFO Roos has been digging into the utility's financial statements and getting things

cleaned up with the finance department. CFO Roos reviewed the transmission and power supply bonds and explained the advantage of holding off paying the principal and interest until September (when they are due). Board Member Freeman asked what the final bond interest amount was, and GM Prairie said that all costs are rolled in at just over three percent (3%). CFO Roos clarified for Mayor Casper that the bonds were taken out in 2021. Board Member Burtenshaw asked if the capital work orders have the correct audited numbers and CFO Roos said he doesn't anticipate changes with the capital work order lines and acknowledged that finance hasn't been showing the work-in-progress correctly for the past few years but has since corrected their reporting. CFO Roos said he would be reviewing and working with the finance department on the fixes.

GM Prairie reviewed the power supply expenses year-over-year and noted a drastic change over the prior year due in part to lower loads and wholesale prices coming down. He added that utilities didn't see price excursions this year (partially attributed to California's ability to dispatch batteries over their peaks) and there weren't widespread, regional heat domes, although one of California's large battery energy storage facilities caught fire and was destroyed. This fire was from a battery failure. Board Member Radford expressed his concerns with the California wildfires bankrupting utilities and GM Prairie explained that utilities have been turning off their power more frequently but will still provide electricity and shouldn't affect wholesale pricing. He pointed out that in the long run, utilities in bankruptcy, while still producing electricity could mostly be impacted if they needed to borrow money. Board Member Freeman said he has concerns over potential gas tariffs and shared an article on how the Pacific Northwest is being most affected. Board Member Larsen asked about battery life and GM Prairie said the current battery technology has roughly 15,000 cycles with improved battery security. Board Member Larsen asked about the peaking plant's generation lifespan and GM Prairie explained that each turbine will run 20,000 hours before a major overhaul is needed and added that if properly maintained, it could run 50-60 years, but usually better technology makes them more economic to replace and sell off the older units.

GM Prairie reviewed the year-over-year revenue and noted that loads were down about three percent (3%) with wholesale pricing higher than retail and pointed out that the Snake River had a decent water year. CFO Roos added that the upper plant was down the prior year and bringing it back online has made a difference in overall generation. GM Prairie speculated that loads have been down due in part to mild weather and good water, but noted a key account's load had been down about thirty percent (30%). Board Member Burtenshaw asked if they were red-tagged in the water crisis and GM Prairie said they likely didn't shut down because they are on well water. He continued to report that revenue is also down despite a small rate increase, no forced outages, and customer growth. He surmised that milder weather, conservation initiatives (IFP doubled their energy conservation program.), and consumer behavior could be the cause and added that Idaho Power is seeing the same anomaly across their territory. Mayor Casper remembers having similar conversations in 2017 where it wasn't fully explained then but may have been attributed to better energy-efficient appliances, LED integration, and/or high-density multi-housing units going in and tending to be electric and not gas. GM Prairie reminded the Board that 18 megawatts at GEM State are now coming into the City's generation and noted that IFP is using the power and no longer selling it to PacifiCorp under contract. He said that summer prices have already collapsed. Board Member Freeman asked if the treaty was helpful, and GM Prairie clarified that the electricity is still generated, and that the treaty only directs who gets the money. GM Prairie stated that forecast net power supply position prices have ticked up some and pointed out that lower stream flows hurt generation when you're hydro-dependent. Board Member Burtenshaw asked how this situation would play out with the new Bonneville Power Administration (BPA) contract. GM Prairie explained that the spring spill would be diverted into the aquifer as surplus water, which is beyond the City's generating capacity in the spring. GM Prairie reviewed the critical water graphs and pointed out that evening and winter peaks are still occurring with no new peaks since 2023 and mentioned there are no forward hedges on the books. GM Prairie explained how the payment in lieu of taxes payment in lieu of taxes (PILOT) is calculated every year and pointed out that the growth in the

payment to the general fund is not growing as fast as traffic funding payment. He explained that funding traffic more heavily seems to head off issues early on and noted that as a result, signals now have battery backups. He added that batteries do take a great deal of maintenance, and an additional staff member was added in 2024 to mitigate those types of routine maintenance needs. GM Prairie said there wasn't a payment cost adjustment (PCA) in 2024, but said depending on how the year shapes up, we may be able to add the credit back in. Board Member Burtenshaw asked if there is value in reviewing the policy every year since the rate stabilization fund balance was raised to $25 million and GM Prairie said that power prices seemed to have stabilized so it likely wouldn't need to be re-adjusted for the near future. Board Member Freeman reminded the Board that the fund was increased from $20 million because GM Prairie called the Board's attention to the deficit (The fund fell below $20 million due to FY2023 power costs exceeding forecasts/rates.), and he is wondering if there would be a time to raise the fund to $30 million. GM Prairie said the policy states there have to be 250 days of cash flow in the bank, which is the best practice and industry standard according to Jim Burr and we have achieved that benchmark. GM Prairie explained how the PCA ties into the rate stabilization fund (Once the fund hits its benchmark of $25 million the remaining money is run through the power supply budget and shown as a PCA, which is returned to customers as a credit.) GM Prairie said he is leaning toward contracting with Shell Energy Trading North America which also supplies Intermountain Gas and added he'll likely want to contract with two additional suppliers. Mayor Casper asked for Board training later in the year on the gas markets and asked if the rate stabilization fund affects the City's ability to borrow money. GM Prairie said that Fitch reviewed the rate stabilization policy and stated that it is impressive and was used to help establish an AA rating for Idaho Falls Power.

GM Prairie explained how Rocky Mountain Power (RMP) customer buyouts work where IFP pays for the infrastructure and the customer pays fifty percent (50%) of RMP's lost revenue and pointed out that if an IFP customer goes over to RMP territory the new RMP customer pays *one hundred percent (100%)* of infrastructure *and* the IFP lost revenue. He commented that the insurance market seems stable for our hydro projects and noted that new bidders on our policy helped us get our competitive pricing last year. He said labor trends are showing there are plenty of job opportunities for the craft trades and noted that Idaho National Laboratory (INL) compensation has increased the past number of years to where we are losing new engineers to them and a lot of consulting engineers are going to the lab. GM Prairie explained that the union employees have retirement gap insurance, so they don't tend to stay on past their retirement qualification for insurance reasons. He said the market survey seems to solve pay and compression issues within the union as well as the rest of the utility and noted he expects the union to continue with the market survey. He explained his desire to require a 2-month retirement notice for regular union employees and an 8-month notice for dispatchers due to their extensive training and the difficulty of hiring specialized positions, including engineers. He said he plans to continue focusing on bringing in junior engineers and cross-training employees, apprentices, etc. He plans to continue offering market-based compensation and noted that higher housing costs in the Idaho Falls area have created a hiring barrier. He plans on adding depth to Information Technology (IT), keeping the organizational chart fluid to align with available talent, and increasing the training budget due to more expensive travel-related costs. GM Prairie's continued area of focus is on inflation and supply chain issues, keeping an eye on the potential for tariffs on steel and aluminum that will financially affect the entire country, not just the utility industry. GM Prairie summed up the capital projects and said the utility recently completed a large undergrounding project (1100 wire with some overhead lines), completed a 4-year long fiber infrastructure buildout to the entire City, successfully underwent a year-long Advanced Distribution Management Systems (ADMS) upgrade, sustained continuous upgrades to the Geographic Information System (GIS), is supporting the Finance department's current finance and customer information system (CIS) software upgrade and is well underway in the peaking plant construction project (biggest project in 40 years). Board Member Freeman asked Economic Development Administrator Smith if fiber accessibility draws people and businesses to Idaho Falls and she said that yes, fiber is a ninety-five percent (95%) priority for people moving to Idaho Falls.

Licensing and Compliance Manager Richard Malloy explained what the Federal Energy Regulatory Commission (FERC) Compliance Dam Safety Part 12 Inspections for high-hazard projects are for and said Gem State and now the Upper Plant undergo these safety inspections every five years. He added that additional studies are an expensive process and tend to focus on what's happened at other utilities. He plans to hire local university students to assist in gathering information for upcoming relicensing studies and said he thought it would give them good experience and professional skills. Mr. Malloy explained how the 5-Year Tabletop and Functional Exercise plays out failure scenarios with typical distractions and said that local law enforcement, emergency services, the Bingham sheriff's office, and others are invited to attend. He reviewed the relicensing process and timeline to obtain a new 40-year license. GM Prairie informed the Board that it's not their job to keep track of compliance requirements and Board Member Freeman said that Mr. Malloy seems to be on top of things. Mr. Malloy added that projects are continuously audited for compliance obligations and showed the Board where to track compliance progress on OneDrive. Mayor Casper said she would like the City Council to be invited to the next tabletop exercise and Mr. Malloy said he would track her request and said the next exercise isn't due for at least two years. GM Prairie reviewed the February safety metrics and explained what happened when a fiber truck slid on the icy mud into another fiber truck and detailed the actions that will be taken to avoid future incidents like these. He said that the fiber expansion project has been going well and that new customers seem to be tracking with projections and noted that the big construction phase is getting positive operating income and can begin to pay back the loan to Electric. GM Prairie explained that he continues to market fiber in various ways and passed around stickers that have a signup QR code so Council Members can assist the community in signing up for fiber. Operations Technology Manager Yancey said the take rates are potentially better than thirty-four percent (34%) and is working to tighten the numbers up over the summer and will report back. GM Prairie added that Idaho Falls Fiber (IFF), a community-owned utility grew faster than any of Utopia's other networks Board Member Freeman inquired if there is competition in the open access market and Mr. Yancey confirmed that he *is* seeing trends toward open access in the industry. GM Prairie reviewed the fiber income statements and noted no surprises or concerns. Mr. Yancey gave an update on cybersecurity and explained what the intrusion detection tools do, and GM Prairie added that substation security is paramount in physical security. Mr. Yancey said that fiber connectivity to traffic intersections on Broadway and Yellowstone is now complete and all the Advanced Metering Infrastructure (AMI) meter traffic is now flowing through the fiber system. GM Prairie pointed out that fiber is not charging the traffic fund for its use. Mr. Yancey said all substations and power plants were successfully cut over to the new Advanced Distribution Management System (ADMS) where about 6000 data points were cut over in 6 months. He added that staff and crews are currently working on the Outage Management System (OMS) portion of the project and are expecting a June 2025 completion date.

Calendar, Announcements, Events and Updates

Mayor Casper reminded the Board of the upcoming American Public Power Association's (APPA) Annual Legislative meetings in Washington D.C. and noted that they will be conducting their own Idaho delegation this year. She mentioned what to expect at April's Energy Alliance Conference (EAC) in Idaho Falls. Mayor Casper said that Ms. Smith is tracking the current energy bills with folks at the Boise Statehouse.

State Legislative Update

Idaho Consumer-Owned Utilities Associated (ICUA) Executive Director Will Hart reviewed the high-priority bills that were previewed in ICUA's January Legislative conference like the Wildfire Standards of Care Act and Federal Permitting Reform.

Peaking Plant Update

GM Prairie reported that the peaking plant project is being built on time and within budget with the underground infrastructure complete, the storage building enclosed and ready for use, the generation

building enclosed and ready for doors, windows, interior walls, roof, etc., and that the pressure gas line from Hitt Road is eighty percent (80%) installed.

Review 2024 Board Self-Evaluation Results

Board Member Freeman said there were eight survey results, indicating that someone took the survey twice and gave different answers both times. He observed that the Board seemed aligned on most of their answers except for the succession planning (with recruitment and retention practices) question to which the presentation addressed most concerns expressed in the survey with no further comments from the Board. Board Member Francis asked if there should be different questions posed next year, and Board Member Larsen suggested maybe rotating sets of questions. Board Member Burtenshaw stated that every time the Board attends utility conferences, she is confident that IFP's Board is very well prepared and informed. Board Member Dingman added that the Board has regular, robust conversations and said the General Manager is always available to answer her questions or take the time to meet in person. She added that the Board seems like they have the right information and are pleased with the staff. Board Member Francis suggested making the IFP Strategic Plan a living document and GM Prairie said that he intends to create future Board presentation slides to correspond with strategic initiatives where appropriate. There was a discussion on how Board packets get disseminated, and it was determined that going forward, the Board Secretary will email the monthly packet link to all Board Members. The interim packets will be sent from the Board Secretary to the Mayor for review for one day and after that, if no review or comments are given then the Secretary is free to send and not wait for the Mayor's response.

There being no further business, the meeting adjourned at 11:46 a.m.

s/ Linda Lundquist

Linda Lundquist, BOARD SECRETARY

s/ Rebecca L. Noah Casper

Rebecca L. Noah Casper, MAYOR

Memorandum

File #: 25-186 **City Council Meeting**

FROM: Bear Prairie, General Manager
DATE: Friday, March 7, 2025
DEPARTMENT: Idaho Falls Power

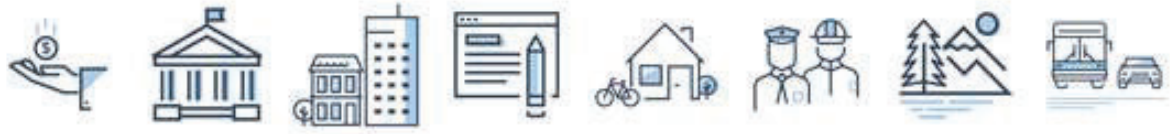
Subject
IFP-25-11 Transformer Inventory for Idaho Falls Power - Pulse Mac, IRBY, KLLEN Group

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the bids from Pulse Mac, IRBY and the KLLEN Group for a total cost of $315,406.40 (or take other action deemed appropriate).

Description, Background Information & Purpose
Idaho Falls Power solicited bids from qualified vendors to resupply IFP's transformer inventory. 12 bids were received with the following three being the lowest responsive, responsible (per line item) bidders. There were lower bids for line item 3, however, the vendors do not meet the FHWA Charging and Fueling Infrastructure Grant's criteria for materials Made in America.

Item	Vendor	Amount
1 & 2	Pulse Mac Solutions	$168,605.00
3	IRBY	$107,600.00
4	KLLEN Group	$39,201.40
	Total	$315,406.40

Alignment with City & Department Planning Objectives



☐ ☐ ☒ ☐ ☐ ☐ ☐ ☐

This action shows our readiness for healthy economic growth by ensuring a well-supplied inventory so that community infrastructure meets current and future needs. This action also supports the growth and reliability elements of the IFP Strategic Plan.

Interdepartmental Coordination

Idaho Falls Power collaborated with the City Attorney.

Fiscal Impact
Funding for this purchase is in the 2024/25 CIP budget.

Legal Review
The City Legal Department concurs that this purchase complies with Idaho state statute.

Idaho Falls Power
Bid Tabulation

Proje Transformers — Number: IFP - 25 - 11
Subm Krista Thornton Facility Services Manager — Date: 3/12/2025

			Dykman Inc. (Westinghouse)			ECB Solutions LLC (Maddox)			Pulse Mac Solutions (Action)		
	Description	Qty	Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time
1	Transformer 3750KVA 480/277	1	$ 173,953.00	$ 173,953.00	42 Weeks	$ 87,000.00	$ 87,000.00	42 Weeks	$ 70,375.00	$ 70,375.00	12-16 Weeks
2	Transformer 2500KVA 480/277	2	$ 139,397.00	$ 278,794.00	42 Weeks	$ 76,000.00	$ 152,000.00	40 Weeks	$ 49,115.00	$ 98,230.00	12-16 Weeks
3	Transformer 500KVA 480/277	4	$ 65,022.00	$ 260,088.00	42 Weeks	$ 27,500.00	$ 110,000.00	23 Weeks	$ 21,312.00	$ 85,248.00	12-19 Weeks
4	Transformer 45KVA 480/277	4	$ 27,443.00	$ 109,772.00	18 Weeks	$ 10,500.00	$ 42,000.00	20 Weeks	$ 11,250.00	$ 45,000.00	12-16 Weeks
	Addendum yes/no	Yes				No			No		
			Total Bid	$ 822,607.00			$ 391,000.00			$ 298,853.00	

Recommended Award for Vendor $ 168,605.00

KLLEN Group America			Kllen Group American			MP Predictive Technologies			Larson Electronics, LLC		
Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time
$ 73,000.00	$ 73,000.00	16-18 Weeks	$ -	$ -		$ 84,915.00	$ 84,915.00	30 Weeks	$ 175,505.41	$ 175,505.41	18-22 Weeks
$ 60,585.50	$ 121,171.00	16-18 Weeks	$ -	$ -		$ 89,910.00	$ 179,820.00	30 Weeks	$ 157,096.00	$ 314,192.00	18-22 Weeks
$ 20,643.68	$ 82,574.72	16-18 Weeks	$ 18,800.00	$ 75,200.00	Stock	$ 38,850.00	$ 155,400.00	30 Weeks	$ 71,806.36	$ 287,225.44	18-22 Weeks
$ 9,800.35	$ 39,201.40	16-18 Weeks	$ -	$ -		$ 19,980.00	$ 79,920.00	30 Weeks	$ 23,692.93	$ 94,771.72	18-22 Weeks
						No			Yes		
	$ 315,947.12			$ 75,200.00			$ 500,055.00			$ 871,694.57	
	$ 39,201.40										

Western United Electric (ERMCO)			Border States (Howard)			IRBY (ABB)			IRBY(Power Electronics)		
Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time
$ 145,420.00	$ 145,420.00	45 Weeks	$ 111,515.20	$ 111,515.20	120 Weeks	$ 282,500.00	$ 282,500.00	68 Weeks	$ 84,950.00	$ 84,950.00	Jul-25
$ 74,410.00	$ 148,820.00	12 Weeks	$ 92,250.43	$ 184,500.86	120 Weeks	$ 81,750.00	$ 163,500.00	18-20 Weeks	$ 64,500.00	$ 129,000.00	May-25
$ 23,678.00	$ 94,712.00	70 Weeks	$ 25,247.13	$ 100,988.52	50 Weeks	$ 26,900.00	$ 107,600.00	14-16 Weeks	$ 26,600.00	$ 106,400.00	May-25
$ 12,456.00	$ 49,824.00	80 Weeks	$ 15,969.24	$ 63,876.96	50 Weeks	$ 13,100.00	$ 52,400.00	14-16 Weeks	$ 14,950.00	$ 59,800.00	Jul-25
Yes			Yes			Yes			Yes		
	$ 438,776.00			$ 460,881.54			$ 606,000.00			$ 380,150.00	
							$ 107,600.00				

Technology International			D&S Electric (Magnatron)		
Unit Cost	Total Amount	Delivery Time	Unit Cost	Total Amount	Delivery Time
$ 89,214.00	$ 89,214.00	30-44 Weeks	$ 90,089.00	$ 90,089.00	46 Weeks
$ 78,456.50	$ 156,913.00	30-44 Weeks	$ 123,524.00	$ 247,048.00	46 Weeks
$ 29,353.00	$ 117,412.00	30-44 Weeks	$ 29,954.00	$ 119,816.00	39 Weeks
$ 11,784.00	$ 47,136.00	30-44 Weeks	$ 13,497.00	$ 53,988.00	39 Weeks
Yes			Yes		
	$ 410,675.00			$ 510,941.00	

Total Award $ 315,406.40

Attending: Krista Thornton
Nikki Bradford

Memorandum

File #: 25-202 **City Council Meeting**

FROM: Ian Turner, Airport Director
DATE: Thursday, April 10, 2025
DEPARTMENT: Airport

Subject
Meeting Minutes from the Idaho Falls Regional Airport Board of Directors 28 February 2025

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the minutes as described below (or take other action deemed appropriate).

Description, Background Information & Purpose
The attached minutes are from the February 28, 2025, Idaho Falls Regional Airport Board meeting.

Alignment with City & Department Planning Objectives

☐ ☒ ☐ ☐ ☐ ☐ ☐ ☐

The minutes support the Good Governance community-oriented result by providing assurance of regulatory compliance to minimize and mitigate risk.

Interdepartmental Coordination
N/A

Fiscal Impact
N/A

Legal Review
N/A

The Idaho Falls Regional Airport Board of Directors for the City of Idaho Falls met on Friday, February 28, 2025, at the Idaho Falls Regional Airport Board Room 2140 N. Skyline Dr. Idaho Falls, ID at 8:00 a.m.

Call to Order and Roll Call

Council President Lisa Burtenshaw called the meeting to order at 8:02 a.m.

There were present:
Mayor Rebecca L. Noah Casper (arrived 8:40 a.m.)
Council Member Michelle Ziel-Dingman
Council Member Kirk Larsen
Council Member Lisa Burtenshaw
Council Member Jim Freeman
Council Member John Radford (virtually)

Absent:
Council Member Jim Francis

Also present:
Ian Turner, Airport Director
Brook Edwards, IDA Board Secretary
Bruce Young, Airport Assistant Director Finance & Administration
Grant Kendall, Airport Safety and Security Manager
Eric Grossarth, Public Information Officer
Michael Kirkham, City of Idaho Falls Attorney
Nathan Cuvala, Ardurra (Virtually)
Wayne Reiter, Ardurra (Virtually)

Finance

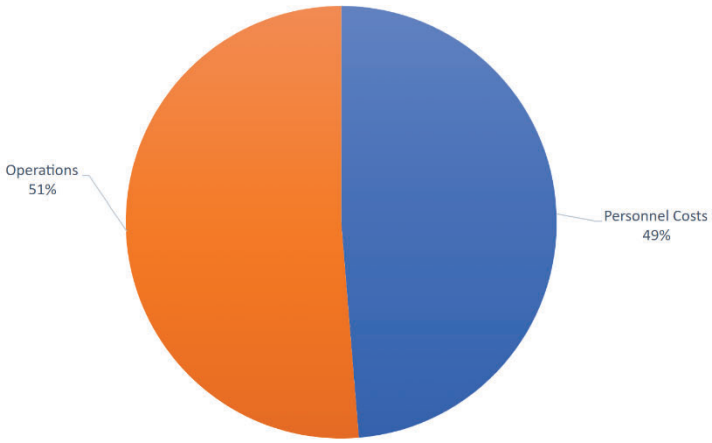
Report: 2024/2025 YTD Budget – Bruce Young, Assistant Airport Director of Finance and Administration

Mr. Young presented the 2024/2025 Year-to-Date Budget Report, providing an overview of the airport's financial position and operational performance. He noted a significant improvement in the cash balance, which had remained negative for much of the year but closed at a positive $1.8 million. The key fund cash balances included Pooled stands at $1,892,739. Meanwhile the Municipal Equipment Replacement Fund (MERF) fund has a balance of $253,309. The Passenger Facility Charge (PFC) Fund has a balance of $3,419,505 and the Customer Facility Charge (CFC) fund has a balance of $891,860.

Mr. Young reported that operating revenue was in line with expectations for the first quarter. When asked if the positive $340,000 was good, Director Turner noted that this same period in recent years had been a negative position. Additionally, he shared unaudited figures for operational revenues and expenses, noting that they were tracking as anticipated.

Unaudited operational revenues and expenses were:

Operating Revenue:	
Parking	$ 586,424
Airlines	509,999
Rental Cars	324,322
General Aviation	111,965
Concessions	25,675
Miscellaneous	67,628
Total Operating Revenue	$1,626,013
Operating Expense:	
Personnel Costs	$ 625,606
Operations	659,030
Total Operating Expense	$1,284,636
Operating Income (loss)	$ 341,377



Policy

Legislative Affairs: Policy #25-0002 –Ian Turner, Airport Director

Mr. Turner presented Policy #25-0002 on Legislative Affairs, emphasizing the airport's role as a critical component of the National Airspace System. He explained that many governmental regulations affecting aviation occur at the national level. To ensure the Idaho Falls Regional Airport can effectively advocate for its interests, this policy was established to facilitate engagement on legislative matters at both the federal and state levels.

Board Travel & Training: Policy #25-0001 – Ian Turner, Airport Director

Mr. Turner introduced the Board Travel and Training, which is designed to promote high-quality governance and informed decision-making among council members through training and travel that furthers the goals and initiatives of the Idaho Falls Regional Airport. Director Turner stated that much of the heart of this policy came from the previous policy that was rescinded at a previous meeting and was just moved to its own policy.

Council Member Freeman moved to approve Policy #25-0002 and Policy #25-0001. Council Member Burtenshaw seconded. The motion carried unanimously.

I-15/US-20 Connector – Cooperating Agency Request – Ian Turner, Airport Director

Mr. Turner provided the requested update on the I-15/US-20 Connector project for the Idaho Transportation Departments (ITD) Environmental Impact Statement (EIS). He explained that the FAA requested the removal of the term "cooperating agency" from a previous draft of the letter, as federal law defines the FAA as a cooperating agency and they felt the term confused the purpose of this letter.

The letter focuses on the net benefits to civil aviation and emphasizes that any outcome is beneficial to civil aviation that is not the No-Build Alternative. Director Turner outlined the project's scope, including anticipated congestion improvements, potential land use impacts, and the methodology used to quantify benefits. He also noted key considerations such as the runway protection zone analysis and ensuring that navigational aids remain unaffected.

The Federal Administrative Administration (FAA) and other stakeholders reviewed the letter, and revisions were made based on their feedback. The board acknowledged the significance of the project and commended the thorough analysis conducted in support of the airport's position. The final calculation, which is hypothetical, came to:

While the *No-Build* option calculates to a $0 net-benefit, the safety factor of doing nothing skews the outcome to a negative net-benefit.

Net Present Value of Benefit				
	2029 (5-yr CPI-U)	2065 (5-yr CPI-U)	2029 (10-yr CPI-U)	2065 (10-yr CPI-U)
No-Build	$0.00	$0.00	$0.00	$0.00
Alternative H2	$59,991,034.59	$181,437,928.47	$57,194,683.49	$126,554,940.86
Alternative E3	$428,174.33	$3,420,748.19	$408,215.92	$2,272,202.32

Council Member Dingman moved to approve sending the letter to the FAA, and Council Member Larsen seconded. The motion carried unanimously.

General Operations

Airport Terminal Building Sewer Line – Ian Turner, Airport Director

Mr. Turner provided an overview of the ongoing sewer line issue, explaining that a leak developed in early summer 2024 in the sewer line exiting the building. Although a temporary repair was made, the issue will persist if not fixed in a permanent way. By late summer, after encountering significant challenges obtaining a quote, the airport obtained one for a permanent repair that exceeded $110,000. However, this estimate did not include restoring the building to its original, operational, condition. Additionally, completing the repair would require halting operations during the work. For these reasons it was not feasible.

Throughout the fall and winter, airport staff explored alternative options but faced difficulties in securing bidders, as multiple companies declined to take on the project. In February, Bortek Utilities from Pocatello provided a quote to repair the pipe in place, offering a potential solution to the problem.

Council Member Freeman moved to approve the quote to repair the sewer line for $94,550.00 and Council Member Dingman seconded. The motion carried unanimously.

Terminal Building Project – Ian Turner, Airport Director

Mr. Turner provided the board with an update on the status of the $15,000 grant for 2025 from the Idaho Transportation Department. This was the only change from the previous board meeting. He reported that recent discussion involving Community Project Funding request in Congress indicated that such requests are not currently at risk of being rescinded during budget discussions due to some Congressional offices have advised communities not to reapply for projects that have already been approved for FY25, reinforcing the expectation that funding will remain intact.

However, Mr. Turner noted that construction costs have increased by approximately 5% since the last estimate. Taking into account the project additions discussed in December, the updated total construction

cost now ranges from $58,650,000 for the base project to $67,100,000 if the necessary value-engineered items that were removed in December 2023 are included again.

Additionally, he informed the board that the most recent Continuing Resolution is set to expire on March 14, and as of now, there has been no significant progress toward passing a full federal budget.

Aviation Worker Screening – Grant Kendall, Safety and Security Manager

Mr. Kendall presented an overview of the federally mandated Aviation Worker Screening (AWS) program to the board. This program, required by the Transportation Security Administration (TSA) for airports of this size, is designed to deter insider threats by screening aviation workers at a frequency that would allow them the expectation to be screened. The screening process aims to detect weapons, explosives, and their components that could be introduced by potential insider threats.

Mr. Kendall informed the board that the airport is responsible for purchasing and maintaining the screening equipment, conducting personnel and property screenings, and addressing insider threats, as TSA does not fund or perform these duties.

To comply with this mandate, the proposed solution includes hiring additional airport staff to conduct screenings in coordination with airport police. It also involves acquiring screening equipment that meets TSA standards, has been vetted by Safe Skies, is user-friendly, mobile, medically safe, and is already established at other locations. The equipment is reasonably priced at $140,000.

The implementation timeline for AWS is as follows:

- March 2025 – Meet with TSA officials in Boise to finalize the AWS program.
- April 2025 – Acquire screening equipment.
- May 2025 – Hire additional staff to support AWS operations.
- June 2025 – Conduct a soft launch of the screening process with stakeholders.
- July 2025 – Fully implement the AWS program to meet the TSA mandate.

No formal vote or action was taken.

Management

Director's Update **–** Ian Turner, Airport Director

Siting Study: Mr. Turner provided the update that the ongoing efforts to resolve Federal Aviation Administration (FAA) objections regarding the preferred location for the Air Traffic Control Tower (ATCT) failed. They have objected to all three potential sites. At this time, no resolution has been reached. To move forward, the feasibility of relocating the Very High Frequency (VHF) Omni-Directional Range (VOR) system must be examined. The VOR is a short-range radio navigation system used by pilots to determine their position and stay on course while flying.

Airport Master Plan: Mr. Turner reported that the final public meeting for the Airport Master Plan was held on February 20, 2025, with strong attendance and positive feedback from participants. The FAA review process remains on schedule, with council approval anticipated at the first meeting in April and FAA acceptance expected in May. Council Member Burtenshaw expressed appreciation to Mr. Turner

and the Ardurra planning team for providing clear communication regarding the soccer field and Runway 17-35, as well as for fostering positive public engagement throughout the process.

Project Update: Mr. Turner informed the board that the final cost of the Johnson Property project was $12,336,785.07. Of this amount, 93.75% was funded by the FAA, with the remaining balance covered by Passenger Facility Charges (PFCs). An amendment to the PFC program is currently in progress to accommodate the increased project costs.

Year-to-Date Statistics: Mr. Turner provided an overview of the current year-to-date passenger statistics, highlighting continued growth in enplanements, deplanements, and total passengers from 2022 to 2025.

- Enplanements have steadily increased, reaching 25,232 in 2025, reflecting a 20.6% growth from the previous year.
- Deplanements have also risen, with 24,747 recorded in 2025, marking a 19.1% increase from 2024.
- Total Passengers (combined enplanements and deplanements) have grown significantly, with 49,797 passengers in 2025, representing a 19.8% increase from the prior year.

Mr. Turner noted that while overall passenger numbers have shown consistent annual growth, the 2022 percentages were skewed due to lingering impacts from 2021's recovery period. The upward trend in passenger traffic demonstrates continued demand and growth at the airport.

Current Year-to-Date Statistics

2022-2025 (January)

Enplanements

2022 – 17,258 (+84.7%)*
2023 – 19,641 (+13.8%)
2024 – 20,923 (+6.5%)
2025 – 25,232 (+20.6%)

Deplanements

2022 – 17,099 (+78.4%)*
2023 – 19,014 (+11.2%)
2024 – 20,783 (+9.3%%)
2025 - 24,747 (+19.1%)

Total Passengers

2022 – 34,357 (81.5%)*
2023 – 38,655 (+12.5%)
2024 – 41,706 (+10.5%)
2025 – 49,797 (+19.8%)

*2022 percentages are skewed by the lingering impacts of the comparison made to 2021.

Mr. Turner provided the board with several general updates:

FAA Compliance Letter: In January, the FAA identified a compliance discrepancy due to the absence of a Water Rescue Plan in the Airport Certification Manual (ACM). In response, the airport submitted a plan on February 1, 2025, which was subsequently reviewed during the Airport Emergency Plan (AEP) Review on February 13, 2025. The compliance issue was officially closed on February 19, 2025. Based on feedback from the review, a revision was submitted to ensure the plan's accuracy.

Federal Employee Staffing Concerns: Mr. Turner noted concerns regarding staffing levels at the FAA – Helena Airport District Office. Previously staffed with 15 employees, the office has been reduced to approximately half that number due to administrative changes. This reduction is expected to result in slower response times for airport-related matters.

Public Engagement: The Airport Director has actively participated in various public engagement opportunities. On February 20, 2025, he presented at the City Club of Idaho Falls. Additionally, he attended a Legislative Luncheon in Boise with the Idaho Airport Management Association. Looking ahead, he is scheduled to present to the Exchange Club of Idaho Falls on March 4, and the Rotary Club of Idaho Falls on March 5, 2025.

There being no further business, the meeting adjourned at 9:45 a.m.

Brook Edwards

Brook Edwards, Board Secretary

Rebecca L. Noah Casper, Chair

Memorandum

File #: 25-208 **City Council Meeting**

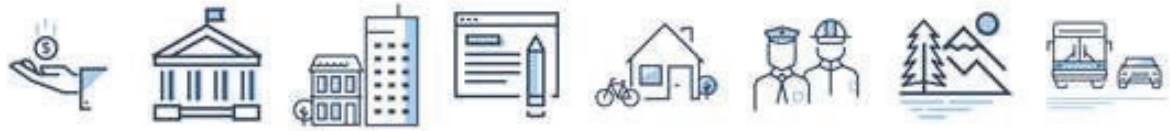
FROM: Michael Kirkham, City Attorney
DATE: Thursday, March 27, 2025
DEPARTMENT: City Attorney

Subject
Downtown Parking Memorandum of Understanding between Idaho Falls Downtown Development Corporation (IFDDC) and the City of Idaho Falls.

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Downtown Parking Memorandum of Understanding between IFDDC and the City of Idaho Falls.

Description, Background Information & Purpose
The attached MOU is for management of downtown parking facilities and enforcement of the City's downtown on-street parking ordinance. This MOU provides that $92,200 in fees be paid for parking management services. In addition, this MOU renewal provides for automatic renewal terms of one (1) year. To comply with the City's constitutional requirements for multi-year agreements, either party may terminate the MOU with six (6) month's written notice without penalty.

Alignment with City & Department Planning Objectives



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The proposed MOU extension is consistent with Community-oriented Results of Good Governance, Transportation, and Livable Communities.

Interdepartmental Coordination
This MOU was reviewed by staff from the Community Development Services, Municipal Services, and Legal departments.

Fiscal Impact
The annual amount of the services provided within this MOU is $92,200.00. This funding is included in the 2024/25 Community Development Services budget.

Legal Review
The Legal Department prepared the MOU.

AMENDMENT TO THE MEMORANDUM OF UNDERSTANDING FOR IFDDC PARKING PROGRAM BETWEEN CITY OF IDAHO FALLS, IDAHO AND IDAHO FALLS DOWNTOWN DEVELOPMENT CORPORATION

THIS AMENDMENT TO THE MEMORANDUM OF UNDERSTANDING FOR IFDDC PARKING PROGRAM BETWEEN CITY OF IDAHO FALLS, IDAHO AND IDAHO FALLS DOWNTOWN DEVELOPMENT CORPORATION (hereinafter "Amendment") is entered into this day _____ of _____, 2024, by and between City of Idaho Falls, Idaho, a municipal corporation of the State of Idaho, whose address is P.O. Box 50220, Idaho Falls, Idaho 83405 (hereinafter "CITY"), and the Idaho Falls Downtown Development Corporation, a 501 (c)(3) Idaho non-profit corporation, 381 Shoup Ave, Ste. 207, Idaho Falls, Idaho, 83402 (hereinafter "IFDDC).

WHEREAS, on January 25, 2024, CITY and IFDDC entered into a Memorandum of Understanding for IFDDC Parking Program Between City of Idaho Falls, Idaho, and Idaho Falls Downtown Development Corporation ("MOU") to provide for parking management services in CITY's downtown area; and

WHEREAS, in a previous agreement, IFDDC had agreed to perform additional services, which would no longer be continued under the January 25, 2024 MOU; and

WHEREAS, the MOU inadvertently reduced the amount owed to IFDDC to seventy-seven thousand dollars ($77,000) a year instead of the agreed upon ninety-two thousand two hundred dollars ($92,200) a year; and

WHEREAS, the parties to this MOU desire to amend the MOU in order to clarify the amount owed thereunder.

THEREFORE, in consideration of the mutual promises below, CITY and IFDDC agree to amend the MOU as follows:

1. **Amendment.** Section 1.5 "Collections and Use of Revenue" of the MOU is amended to read in its entirety as follows:

   CITY agrees to pay IFDDC ninety-two thousand two hundred dollars ($92,200) per year, during the term of this MOU, for management and enforcement of on-street and off-street parking in the area illustrated in Exhibit "A." IFDDC shall collect revenues associated with regulation and enforcement of the IFDDC Parking Program, including collection of administrative fines and penalties related to enforcement as described in this MOU, on dedicated CITY streets, parking lots, and public rights-of-way in the area shown in Exhibit "A." IFDDC agrees that revenues generated from parking enforcement, encompassed by this MOU, shall be specifically accounted for and used exclusively on public transportation or maintenance and improvement of CITY streets, public rights-of-way, public parking facilities, and public property, as directed by CITY. In the event that IFDDC's costs exceed, ninety-two thousand two hundred dollars ($92,200), IFDDC may deduct

reasonable costs directly attributable to enforcement or collection of parking revenue from the amount of revenue collected for and on behalf of CITY.

Nothing in this MOU precludes IFDDC from retaining monies collected in excess of IFDDC program expenses as reserve funds for future downtown parking enhancements.

2. All other terms and conditions of the Agreement will remain in full force and effect, except as modified herein.

IN WITNESS WHEREOF, the parties through their duly authorized representatives have signed the this Amendment the day and year first written above.

ATTEST:

CITY OF IDAHO FALLS

_____
Corrine Wilde, City Clerk

By: _____
Rebecca L. Noah Casper, Mayor

IFDDC

By: _____

STATE OF IDAHO)
) SS.
County of Bonneville)

On the _____ day of _____, 2024, before me, the undersigned, a notary public for Idaho, personally appeared Rebecca L. Casper, known to me to be the Mayor of the City of Idaho Falls, Idaho, the municipal corporation that executed the foregoing document, and acknowledged to me that he is authorized to execute the same for and on behalf of said City.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year first above written.

_____
Notary Public for State of Idaho

Residing at Idaho Falls, Idaho
(Seal) My Commission Expires: _____

STATE OF IDAHO)
) SS.
County of Bonneville)

On the _____ day of _____, 2024, before me, the undersigned, a notary public in and for said State, personally appeared _____, known or identified to me to be the person whose name is subscribed to the within instrument and acknowledged to me that she executed the same on behalf of the Idaho Falls Downtown Development Corporation.

IN WITNESS WHEREOF, I have hereunto set me hand and affixed my official seal, the day and year in this certificate first above written.

_____
Notary Public for State of Idaho

Residing at Idaho Falls, Idaho
(Seal) My Commission Expires:_____

Memorandum

File #: 25-189 **City Council Meeting**

FROM: Emily Geisler, City Clerk
DATE: Tuesday, March 11, 2025
DEPARTMENT: Mayor's Office

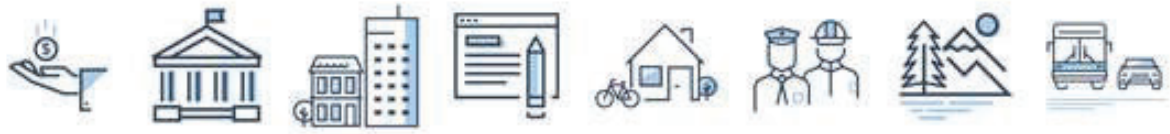
Subject
City Council Meeting Minutes

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the City Council Meeting Minutes from December 19, 2024, January 9, 2025, January 30, 2025, February 13, 2025, and February 27, 2025

Description, Background Information & Purpose
Attached are the following:

- December 19, 2024, City Council Meeting Minutes
- January 9, 2025, City Council Meeting Minutes
- January 30, 2025, City Council Meeting Minutes
- February 13, 2025, City Council Meeting Minutes
- February 27, 2025, City Council Meeting Minutes

Alignment with City & Department Planning Objectives



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The Minutes support the Good Governance community-oriented result by providing assurance of regulatory and policy compliance to facilitate transparency and minimize and mitigate risk.

Interdepartmental Coordination
N/A

Fiscal Impact
N/A

Legal Review

N/A

City Council Meeting Minutes

680 Park Avenue
Idaho Falls, ID 83402

Thursday, December 19, 2024 | 7:30 PM | City Council Chambers

1. **Call to Order**

Present: Mayor Rebecca L Noah Casper, Council President Burtenshaw, Councilor Radford, Councilor Ziel-Dingman, Councilor Freeman, Councilor Francis; and Councilor Larsen

Also present:
Pam Alexander, Director of Municipal Services
Chris Fredericksen, Director of Public Works
Wade Sanner, Director of Community Development
Micheal Kirkham, City Attorney
Jasmine Marroquin, Deputy City Clerk

2. **Pledge of Allegiance**

Councilor Jim Freeman led those present in the Pledge of Allegiance.

3. **Public Comment**

No one appeared.

4. **Consent Agenda**

A. Municipal Services

1. Renewal of Cityworks Annual Maintenance Agreement

B. Public Works

1) Change Order 6 - Pancheri Drive Bridge over the Snake River Rehabilitation Project

C. Idaho Falls Power

1) IFP 25-04 Wood Pole Inventory for Idaho Falls Power
2) IFP 25-02 Transformer Inventory for Idaho Falls Power
3) IFP-25-03 Pad Mount Switchgear Inventory for Idaho Falls Power

D. Office of the City Clerk

1) Meeting Minutes from Council Meetings
2) License Applications

It was moved by President Burtenshaw, seconded by Councilor Freeman to approve, accept, or receive all items on the Consent Agenda according to the recommendations presented. The motion carried by the following vote: Aye – Councilors Radford, Freeman, Burtenshaw, Francis, Dingman, Larsen. Nay – None

5. Regular Agenda

A. Municipal Services

1) Frontier Center for the Performing Arts Professional Services

This request is to approve a change order to the professional services contract to add construction phases, and administration services for the Frontier Center for the Performing Arts ADA Restroom and Lobby Expansion project.

Direct Alexander presented a project for the Frontier Center for the Performing Arts lobby expansion. The project aims to install accessible bathrooms in the facility, which have been lacking for many years. This item is a request to approve a change order with the architects, P.A. and studio, who were awarded the original design contract. The change order, costing $140,000, will provide construction administration services to support the Public Works Department during the project. The architects will collaborate closely with the department to ensure smooth progress.

It was moved by Councilor Larsen, seconded by Councilor Burtenshaw to accept a change order to the AKM Architecture, P.A. and studio i, LLC, professional services contract in the amount of $140,000. The motion carried by the following vote: Aye – Councilors Dingman, Radford, Francis, Burtenshaw, Larsen, Freeman Nay – None

B. Public Works

1) State Local Agreement and Resolution with the Idaho Transportation Department (ITD) for the Yellowstone Sidewalk Connection

Direct Fredricksen discussed two projects funded through a new source for congestion mitigation and air quality improvements, both requiring a 7.34% match. The first project involves building a sidewalk along the Yellowstone Highway from Pancheri to Sunnyside, addressing intermittent sidewalks and aiming to place the sidewalk as far from traffic as possible. The project has $803,000 in funding, with a required local match of about $58,940.

It was moved by Councilor Francis, seconded by Councilor Larsen to approve the State Local Agreement and Resolution with the Idaho Department of Transportation (ITD) for the Yellowstone Sidewalk Connection and authorize the Mayor and City Clerk to sign the necessary documents. The motion carried by the following vote: Aye – Councilors Freeman, Francis, Larsen, Radford, Burtenshaw. Nay - None.

2) State Local Agreement and Resolution with the Idaho Transportation Department (ITD) for the Idaho Canal Trail Extension, Sunnyside Road to 49th South.

Director Fredricksen presented the second project focuses on extending the Idaho Canal Pathway on the east side of the canal, reaching the School District 91 property and possibly extending to 49th South. This project has $393,000 in funding, with a match of $28,846.

Councilor Freeman asked why the sidewalk is on the west side, considering the railroad on the east. Director Fredricksen explained that the west side was chosen for better access to businesses and because there are no safe crosswalks on the busy road. Future funding may focus on the east side.

Councilor Larsen inquired about curb cuts on the west side, and Director Fredricksen confirmed improvements will be made to ensure ADA compliance.

Mayor Casper asked if non-compliant curb cuts would be removed. Director Fredricksen explained that abandoned curb cuts would be replaced, though removing existing ones is challenging due to business resistance.

Councilor Burtenshaw expressed excitement about the project's improvements to access for residents and the Haven park. Councilor Radford asked about pedestrian and bike safety, and Director Fredricksen emphasized the need for separation from traffic, despite infrastructure challenges.

Councilor Radford also asked about sidewalk width. Director Fredricksen said the goal is at least five feet, aiming for eight feet if possible with funding.

Mayor Casper inquired about bike accommodations, and Director Fredricksen explained the plan includes a 10-foot multiuse path, with the river walk for cyclists preferring separation from traffic.

Mayor Casper also asked if safety is a primary consideration in funding. Director Fredrickson clarified that safety issues have separate funding but sidewalk projects typically use congestion mitigation funds.

Councilor Francis highlighted how the project supports the city's plan for walkable areas, enhancing access to a grocery store and reducing car dependency.

It was moved by Councilor Francis, seconded by Councilor Larsen to approve the State Local Agreement and Resolution with the Idaho Department of Transportation (ITD) for the Idaho Canal Trail Extension, Sunnyside Road to 49th South and authorize the Mayor and City Clerk to sign the necessary documents. The motion carried by the following vote: Aye – Councilors Francis, Dingman, Freeman, Larsen, Radford, Burtenshaw. Nay -None.

C. City Attorney
1) Conduct a Public Hearing and Approve an Amendment to City Development Impact Fee Ordinance to Include Section on Mediation
Idaho Code Title 67, Chapter 82 authorizes cities and counties to impose development impact fees to cover the costs of necessary infrastructure and facility improvements.

Idaho Code section 67-8212 specifically addresses the requirement that a development impact fee ordinance will provide an option for mediation by an independent party to address disagreements that relate to impact fees for proposed development during an appeal process. The City's first enactment of its development impact fee ordinance included language that addressed mediation. A subsequent amendment to the impact fee ordinance inadvertently removed that language. The proposed amendment restores the language.

City Attorney Michael Kirkham explained that an amendment to the ordinance is being proposed to restore language that was originally part of the city's 2023 impact fee ordinance. Idaho law requires that all development fee ordinances include mediation as an option for resolving disputes during the impact fee appeal period. This feature was unintentionally removed when changes were made earlier in the year, but the amendment will restore the language as it was in the original ordinance.
The hearing was opened-No members of the public entered the room.
The hearing was closed. No deliberation was needed.

It was moved by Councilor Burtenshaw, seconded by Councilor Larsen Conduct the required Public Hearing and Approve the Amended Ordinance for City Development Impact Fees which includes language pertaining to mediation, pursuant to Idaho Code, under a suspension of the rules requiring three complete and separate readings, request that it be read by title and published by summary the motion carried by the following vote: Aye – Councilors Larsen, Radford, Francis, Dingman, Burtenshaw Nay - None.

6. **Announcements**
   Mayor Casper made the follow announcements:
- The city will be closed on December 25th and January 1st, with lighter staffing on Christmas Eve and New Year's Eve afternoons. There may be longer wait times for service.
- The UV Light Parade is coming up, and road closures on Pancheri and Broadway will impact the West Side. The city has posted signs to notify people. The event is a fundraiser and food drive for the local food bank.
- The first council meeting of the year will be on January 9th. There will also be events in Boise, including the State of the State address and a meeting with legislators.

7. Adjournment.

There being no further business, the meeting adjourned at 8:05 PM

/s/ Jasmine Marroquin
Jasmine Marroquin, Deputy City Clerk

/s/ Rebecca L. Casper
Rebecca L. Noah Casper, Mayor

City Council Meeting Minutes

680 Park Avenue
Idaho Falls, ID 83402

Thursday, January 9, 2025 | **7:30 PM** | **City Council Chambers**

1. **Call to Order**

Present:
Mayor Rebecca L Noah Casper
Council President Lisa Burtenshaw
Councilor Jim Francis
Councilor Jim Freeman
Councilor Kirk Larsen
Councilor John Radford
Councilor Michelle Ziel-Dingman

Also present:

Ian Turner, Airport Director
Pam Alexander, Municipal Services Director
PJ Holm, Parks and Recreation Director
Wade Sanner, Community Development Services, Director
Bryce Johnson, Police Chief
Chris Fredericksen, Public Works Director
Margaret Wimborne, Chief of Staff
Eric Grossarth, Public Information Officer
Stephan Boorman, Power Assistant General Manager
Michael Kirkham, City Attorney
Jasmine Marroquin, Deputy City Clerk

Council President Lisa Burtenshaw motioned to amendment to the agenda, to include the Mayor's Choice Awards to after the Pledge of Allegiance but before Public Comment, seconded by Councilor Radford. The motion carried by the following vote: Aye- Francis, Dingman, Freeman, Larsen, Radford, Burtenshaw. Nay- None.

2. **Pledge of Allegiance**

Mayor Casper led those present in the Pledge of Allegiance.

3. **Mayors Choice Awards**

- Making Something Out of Nothing Award: This award recognized Idaho Falls High School's community, including Heather Thompson, Steve Hunter, Brandon Lee, Trent Johnson, and Lisa Burtenshaw effort in creating a new sports complex, Frontier Fields. For years, the school lacked home fields, and teams practiced in poor conditions. Thanks to years of planning and fundraising by dedicated parents and community members, over $500,000 was raised, and the project was

completed with volunteer work. The new complex includes soccer, football, baseball, softball fields, and tennis courts, providing a much-needed home for local athletes.

• Outstanding Community Members Award: David and Eloise Snell were honored for their leadership in promoting cultural awareness and diversity in Idaho Falls. David founded the Idaho Falls African American Alliance (IFAA), which combats racial stereotypes and provides community support. The Snell's have organized events such as the annual Martin Luther King Jr. fundraising banquet and have supported initiatives like the Juneteenth celebration and dialogues on racial issues, fostering unity in the community.

• Outstanding Community Service Award: Just Serve, a national organization connecting volunteers to service opportunities, was recognized for its impact in Idaho Falls. In 2024, Just Serve coordinated over 1,300 service hours through 600 volunteers, including cleaning trails, organizing events, and facilitating youth service projects. Notably, Susan Stookey's Valentine's Day project brightened the lives of thousands of seniors with handmade valentines and flowers.

• Outstanding Community Enrichment Award: The Idaho Falls Music Club, with over 113 years of service, was honored for its contributions to music education and the arts. The club helped establish the Idaho Falls Symphony and Choraleers and offers scholarships and workshops. In 2023, it awarded over $15,000 in scholarships, enriching the local music community.

• Outstanding Community Spirit Award: The Idaho Falls Bridge Builders were recognized for their efforts in welcoming refugees. They sponsored Afghan Air Force pilots and their families through various programs, helping them integrate into the community. With donations of over $80,000, the Bridge Builders have supported these individuals, helping them find work, go to school, and contribute to the local economy. Joe and Kim Mitchell accepted the award on behalf of the organization.

4. Public Comment

Faith Neibert expressed gratitude for public transportation services, mentioning how it helps people connect with the community. She also advocated for lower costs for disabled transit services.

Mosey, the owner of The Heart, a venue for local and underground music in Idaho Falls, shared his frustrations with the City's lack of clear communication and inefficient processes that have hindered small businesses like his. He highlighted the broader social issues, including mental health struggles and economic instability, caused by these inefficiencies. Despite starting The Heart in 2020, Mosey and his team have created a positive space for diverse artists, with a notable impact on the community, such as preventing suicide and supporting youth. However, delays and a lack of support from the City have stalled progress, affecting both artists and the community. Mosey called for better support for small businesses and creative spaces, emphasizing their importance for community growth and well-being. He urged the City to improve processes to ensure such businesses can thrive and continue serving the community.

Bob Nitschke, raised concerns about the Idaho Falls Zoo's safety and management in his report, Idaho Falls Zoo: None Dare Call It Safe. He highlighted issues like animal welfare, safety, and management failures, including a lion encounter. Mr. Nitschke criticized the zoo's leadership for negligence, which he believes endangered both people and animals. He provided recommendations for improvement and hopes his report will prompt the City to take action. Despite financial limitations, Mr. Nitschke is committed to raising awareness and advocating for change at the zoo.

4. Consent Agenda

A. Public Works
1) Bid Award - North Park Drive Realignment

B. Idaho Falls Power
1) Professional Services Agreement with Electrical Consultants, Inc. - Task Order No. 1 - 20-year Long Range Plan and System Review

C. Airport
1) Engagement Letter Approval- Law Firm of Hawley, Troxell, Ennis & Hawley LLP

D. Municipal Services
1) Impact Fee Quarterly Report
2) IF-25-0007, Bulk Ammunition for Idaho Falls Police Department

E. Office of the City Clerk
1) License Applications, all carrying the required approvals

It was moved by President Burtenshaw, seconded by Councilor Radford to approve, accept, or receive all items on the Consent Agenda according to the recommendations presented. The motion carried by the following vote: Aye – Councilors Radford, Freeman, Burtenshaw, Francis, Dingman, Larsen. Nay – None.

5. Regular Agenda

A. Office of the Mayor
1) Appointment of City Clerk

Council President Burtenshaw mentioned interviewing Emily Geisler, expressing strong approval of her and excitement about her appointment. Both the Mayor and Council President highly recommend her, and her information is included in the packet for any questions.

It was moved by President Burtenshaw, seconded by Councilor Freeman to confirm the appointment of Ms. Emily Geisler to be the Idaho Falls City Clerk. The motion carried by the following vote: Aye – Councilors Dingman, Burtenshaw, Francis, Freeman, Larsen, Radford. Nay – None.

B. Municipal Services

1) Purchase Orders for Replacement Vehicles for the Parks and Recreation and Fire Departments

Director Alexander request for approval of six purchase orders for replacement vehicles for the Parks and Recreation Department and one vehicle for the Fire Department, totaling over $300,000. These orders were placed with Smith Chevrolet through the State of Idaho's cooperative purchasing agreement. However, due to a miscommunication, the orders were placed out of sequence, causing the need for Council approval after the orders had been issued. While the items are budgeted and necessary, the process was not followed correctly, and the city is now seeking approval for the six purchase orders.

Councilor Francis thanked Director Alexander for her quick and clear response to the purchase order issue. He praised centralized purchasing for improving coordination and saving costs, and expressed his support for the process.

It was moved by Councilor Larsen, seconded by Council President Burtenshaw to accept and approve the six purchase orders issued to Smith Chevrolet for a total of $301,071.19. The motion carried by the following vote: Aye – Councilors Freeman, Francis, Larsen, Radford, Burtenshaw, Dingman. Nay – None.

2) Purchase of Replacement Vehicles for the Public Works and Parks and Recreation Departments and Two Additions to Fleet for Parks and Recreation.

Director Alexander request for approval of the purchase of replacement vehicles for Public Works and Parks and Recreation, as well as two additional vehicles for Parks and Recreation's Horticulture and Irrigation divisions. These additions were part of the approved budget for the fiscal year. The total amount for the vehicles is $345,408.68, and the request is to authorize the purchase from Smith Chevrolet. The vehicles were planned for replacement in the current budget cycle.

It was moved by Councilor Larsen, seconded by Council President Burtenshaw to approve the purchase of replacement vehicle(s) and two additions to the fleet from the State of Idaho contract SBPO18200325 from Smith Chevrolet for a total of $345,407.68. The motion carried by the following vote: Aye- Councilors Francis, Dingman, Freeman, Larsen, Radford, Burtenshaw. Nay- None.

5. Announcements

Mayor Casper provided updates on upcoming events and calendar changes. The work session scheduled for January 13th has been moved to January 15th due to the Governor's State of the State address. The State of the City address will be on January 15th. The City will be closed on

January 20th for Martin Luther King Jr. Day, and several Council members will attend events in Boise related to the Association of Idaho Cities. The next Council meetings will take place on January 27th and 30th. Mayor Casper also mentioned the significant snow removal efforts in January, noting that more people had subscribed to the City's snow removal text alert service, which likely reduced towing situations. She advised residents not to get frustrated if their driveway is plowed in, as the plows typically return within an hour to clear the area.

Councilor Radford urged citizens and businesses to take responsibility for clearing their sidewalks, especially along the 17th Street corridor, to assist individuals with mobility challenges, such as those in wheelchairs. He shared an example of someone unable to walk on the sidewalk due to inadequate snow removal, stressing the importance of snow clearing for public access and transportation. While homeowners should also clear their sidewalks, businesses, particularly along busy corridors, play a crucial role in maintaining clear walkways. Councilor Radford also highlighted that 20% of people have some form of disability, which in Idaho equates to about 400,000 people, a significant number larger than the city's population, emphasizing the need to consider the needs of people with disabilities.

Councilor Francis reminded everyone that Martin Luther King Civil Rights Day will be celebrated on January 20th, with various events in the community, including a banquet on January 16th, with tickets available on the IFAAA.org website. A group of young people, the "Freedom Readers," will perform a Reader's Theater tribute to the Civil Rights Movement and Martin Luther King’s words, with two performances: one on January 18th at the Museum of Idaho and another on January 19th at the Food Basket. Councilor Francis also thanked Director Fredericksen, expressing appreciation for the snowplows clearing streets at 2 a.m., ensuring residents can still get out of their driveways the next morning due to effective snow removal.

Council President Burtenshaw announced the new County Commissioners, Mallard and Casperson, being sworn in on January 13th at 10 a.m. She also shared his appreciation for the snow removal efforts in Idaho Falls. Council President Burtenshaw recounted an emotional experience while driving on Sunnyside Road, where she saw four snowplows clearing the roads, which made her feel proud of the city's efforts to maintain the roads during snow events.

Councilor Larsen praised the sidewalk near Pancheri on the west side, noting that it is always clean, especially early in the morning. He learned from Director Fredericksen that the work was done by Parks and Recreation and thanked Director PJ Holm and his team for their efforts, emphasizing that their work is appreciated and noticed.

There being no further business, the meeting adjourned at 8:50 PM

/s/ Jasmine Marroquin
Jasmine Marroquin, Deputy City Clerk

/s/ Rebecca L. Noah Casper
Rebecca L. Noah Casper, Mayor

City Council Meeting Minutes

680 Park Avenue
Idaho Falls, ID

Thursday, January 30, 2025 | **7:30 PM** | **City Council Chambers**

1. **Call to Order**
   The meeting was called to order by the Mayor at 7:32pm. The City Clerk called the roll.

Present:

Mayor Rebecca L. Noah Casper
Council President Lisa Burtenshaw
Councilor Michelle Ziel-Dingman
Councilor Jim Francis
Councilor Jim Freeman
Councilor Kirk Larsen

Absent: Councilor John Radford
A quorum was confirmed.

Also Present:

Emily Geisler, City Clerk
Michael Kirkham, City Attorney
Wade Sanner, Community Development Services
Bear Prairie, Idaho Falls Power
Darin Jones, Human Resources
Chris Fredricksen, Public Works
Ian Turner, Airport
Pam Alexander, Municipal Services
Mark Hagedorn, Finance
Alison Shindurling, Party to Appeal
Rollie Walker, Party to Appeal
Gary Cooper, Appeal Attorney

2. **Pledge of Allegiance**
   Councilor Dingman led the Pledge of Allegiance.

3. **Public Comment**

Scott Klingler, Idaho Falls resident
Mr. Klingler shared concerns regarding the challenges his family-owned business, *The Cat and The Fiddle Preschool*, has encountered due to city procedures. The preschool, which has been a part of the community for 20 years, relocated within the same building. There were issues with communication, delays and inspections from Fire and Building. Mr. Klingler expressed frustration that the building department overstepped by shutting down the preschool without offering a grace period, causing significant disruption for nearly 75 students and their families. The disruption led to serious mental and physical health challenges for his family. Mr. Klingler emphasized that the City's approach to this issue has felt punitive rather than service-oriented, and he requested better support and communication from the City moving forward.

Mayor's Response:
The Mayor thanked Mr. Klingler and acknowledged the difficulties he and his wife have faced and encouraged further discussion with relevant City employees.

No additional public comments were made.

4. **Consent Agenda**
   Request to Amend Consent Agenda:
   Councilor Francis requested the transfer of Item D.1 under Idaho Falls Power to the regular agenda (as Item 5.A.1), allowing for further explanation by Director Bear Prairie regarding the contract with ESI.

Consent Agenda Items

A. **Office of the Mayor**
   1. Appointments to City Boards, Committees and Commissions
   2. Consideration of Appointments to City Boards, Committees and Commissions
   3. Consideration of Appointment to a City Board, Committee or Commission
B. **Airport:**
   1. Minutes from the Idaho Falls Regional Airport Board of Directors Meeting, as listed on the agenda
C. **Public Works:**
   1. Bid Award - North Boulevard and Shelley Street Storm Lift Station Upgrades
   2. Bid Award - Westside Path Connections
   3. Bid Award - Lincoln Park Water Line
D. **Idaho Falls Power:**
   1. (Moved to Regular Agenda)
   2. IFP Administration Building Renovation - Professional Office Environments - Office Systems and Furniture
   3. IFP Hydro Relicensing Studies - SWCA Environmental Consultants
E. **Municipal Services:**
   1. Treasurer's Report for November 2024
F. **Office of the City Clerk:**
   1. License Applications, all carrying the required approvals

Motion: Approve, accept or receive all items on the consent agenda according to the recommendations presented.

- Moved by: Council President Burtenshaw
- Second: Councilor Larsen
- Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Burtenshaw - Yes

- All members present voted in favor. Motion carries.

5. Regular Agenda

A.1: Idaho Falls Power - Peaking Plant (moved from the Consent Agenda)

Director Bear Prairie provided an update on the Idaho Falls Peaking Plant, explaining the design-build process and ongoing development. Adjustments to the project have resulted in a net savings of $800,000 under the original cost. The timeline for the project is on track, with completion expected by December 2025. The Council was asked to approve the Guaranteed Maximum Price (GMP) for the construction phase, which is set at $23,460,668, with an additional construction contingency built in.

Motion: Accept and approve ESI's construction phase guaranteed maximum price at $23,460,668 and give authorization to the Mayor and City Clerk to execute the necessary documents.

- Moved by: Councilor Dingman
- Second: Councilor Freeman
- Vote: Freeman – Aye, Francis – Aye, Larsen – Yes, Burtenshaw – Yes, Dingman - Yes
- All members present voted in favor. Motion carries.

A.1.1: Consideration of Personnel Policy Manual Updates:

Director Darin Jones presented updates to the City's Personnel Policy Manual, which underwent a thorough review process in 2024. Changes were made to improve clarity and address employee feedback. Councilor Dingman expressed her appreciation for the comprehensive updates and the incorporation of employee feedback. The final policies were presented for approval.

Motion: Approve the personnel policy changes as presented.

- Moved by: Councilor Dingman
- Second: Councilor Freeman
- Vote: Dingman – Yes, Burtenshaw – Yes, Francis – Aye, Freeman – Yes, Larsen - Yes
- All members present voted in favor. Motion carries.

A.2: Consideration of Employee Benefits Broker Recommendation:

Director Darin Jones reviewed the RFP process for selecting a new employee benefits broker. After evaluating proposals, GBS was found to be the best option due to lower costs and higher services. A five-year contract with GBS was proposed.

Motion: Approve committee recommendation to award a 5-year contract to GBS to serve as the City's benefits broker.

- Moved by: Councilor Dingman
- Second: Councilor Freeman
- Vote: Freeman – Yes, Francis – Aye, Larsen – Yes, Burtenshaw – Yes, Dingman - Yes
- All members present voted in favor. Motion carries.

B.1: Bid Award – Street Overlays 2025

Chris Fredericksen, Public Works Director, gave an overview of street overlays and striping. He answered a few questions from Councilors.

Motion: Approve the plans and specifications; award to the lowest responsive, responsible bidder, HK Contractors, Inc. for $2,699,629.90 and give the authorization for the Mayor and City Clerk to execute the necessary documents.

- Moved by: Councilor Francis
- Second: Councilor Larsen
- Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Burtenshaw - Yes
- All members present voted in favor. Motion carries.

B.2: Consideration of State Local Agreement and Resolution with the Idaho Transportation Department for the Holmes Avenue, Sunnyside Road to Taylorview Middle School Project

Chris Fredericksen discussed a State Local Agreement with the Idaho Transportation Department (ITD) regarding the widening of Holmes Avenue from Sunnyside Road to Taylorview Middle School to at least three lanes, with additional features including sidewalk, curb, gutter, and street lighting on the west side. There are potential complications regarding the acquisition of county properties to expand the road to five lanes. The project will focus on the west side to improve bicycle and pedestrian connectivity. The total project cost is estimated at $3,967,600, with a required 7.34% match ($291,222). Design funding is available for the current fiscal year, but construction funding is still being secured.

Council Comments: The Mayor and Council members emphasized the safety benefits of the project, especially for school children walking and biking to Taylorview Middle School, though it is not expected to be completed this year. Questions were raised by Council members about the right-of-way acquisitions, particularly the need to acquire County properties for the full project.

Motion: Approve the State Local Agreement and Resolution with the Idaho Department of Transportation (ITD) for the Holmes Avenue, Sunnyside Road to Taylorview Middle School project and authorize the Mayor and City Clerk to execute the necessary documents.

- Moved by: Councilor Francis
- Second: Councilor Larsen
- Vote: Dingman – Yes, Francis – Aye, Burtenshaw – Yes, Larsen – Yes, Freeman - Yes

- All members present voted in favor. Motion carries.

B.3: Consideration of Federal Transit Administration (FTA) Section 5307 Urbanized Area Formula Grants Program Funding Agreement

Chris Fredericksen presented a funding agreement with the FTA for Section 5307 CARES Act. The agreement extends the utilization period for the funding through 2030. The original funding, allocated for micro-transit services, has been managed well, with nearly $4.2 million allocated and $943,979 remaining. The funding has been supplemented by corporate sponsors and advertising dollars, ensuring the program's sustainability.

Council Comments: Councilor Freeman acknowledged the role of corporate sponsors in supporting the GIFT program and its continued success.

Motion: Approve the FTA 5307 Urbanized Area Formula Grants Program Funding Agreement and authorize the Mayor to sign the necessary documents.

- Moved by: Councilor Francis
- Second: Councilor Larsen
- Vote: Burtenshaw – Yes, Larsen – Yes, Dingman – Yes, Freeman – Yes, Francis - Aye
- All members present voted in favor. Motion carries.

C.1: Approval of a Professional Services Agreement for Underwriting Services

Airport Director Ian Turner discussed a professional services agreement for bond underwriting related to the potential expansion of the airport terminal building. An RFP was issued, and after scoring proposals, Stifel Nicolaus and Company was selected as the top proposer based on their experience with similar projects at regional airports in Montana and their cost-effectiveness. The costs for this professional services contract will be covered through a successful bond issuance.

Council Comments: Councilor Freeman emphasized the importance of expanding the airport as it is the second busiest in Idaho, with a significant year-over-year increase in traffic. The expansion would address the growing demand for better baggage claim facilities and parking.

Motion: Approve the selection of Stifel, Nicolaus & Company, Incorporated, to provide underwriting services for potential borrowing related to the airport terminal building expansion.

- Moved by: Council President Burtenshaw
- Second: Councilor Larsen
- Vote: Freeman – Yes, Burtenshaw – Yes, Francis – Aye, Dingman – Yes, Larsen - Yes
- All members present voted in favor. Motion carries.

C.2: Consideration of Clayco, Incorporated's Change Order 3 to its contract for the Idaho Falls Regional Airport Terminal Expansion

Airport Director Ian Turner discussed the third change order to Clayco Incorporated's contract for the Idaho Falls Regional Airport Terminal Expansion. The change order was necessary due to adjustments in the funding picture and scope of work related to the project.

Background: Clayco was selected as the general contractor for the project in July 2023. The first two change orders addressed re-packaging the work, selected demolition, and space specification verification. A proposed change order in January 2024 was to purchase long lead items, including a chiller and other items. However, due to a lack of expected grant funding, the project was paused. Clayco completed their work as requested, and the funds were paid except for some remaining balances.

New Scope: The work now being considered involves utility and infrastructure packages, referred to as enabling work. This includes moving utilities from under the building to a new small structure. This will serve both the expansion and eventual full build-out of the airport according to the master plan.

Change Order Details: The change order, totaling $93,365, includes approximately $50,000 to $60,000 of unused funds from the previous two change orders. The total contract amount will increase to $684,993, plus any reimbursables eligible under the contract. Funding for this work is available through existing grants.

Questions & Clarifications: Mayor Casper inquired about the location of the infrastructure facility. Director Turner clarified that the facility would be located near the airport's security fence, dividing the public and non-public areas. It will be a secured, hardened area with controlled access and no public windows.

Motion: Approve Clayco, Inc's Change Order 3 to its July 2023 Construction Manager General Contractor contract for the Idaho Falls Regional Airport Terminal Building Expansion and to authorize the Mayor to sign the necessary documents.

- Moved by: Council President Burtenshaw
- Second: Councilor Larsen
- Vote: Larsen – Yes, Francis – Aye, Dingman – Yes, Burtenshaw – Yes, Freeman - Yes
- All members present voted in favor. Motion carries.

D.1: Purchase of Water Meters and Cellular Endpoints for Public Works

Municipal Services Director Pam Alexander presented a quote from Hydro Specialties Company for the purchase of water meters and cellular endpoints for the Public Works Department.

Background: In January 2023, a work session was conducted by the Public Works Department and Water Division, which led to the selection of Hydro Specialties as the sole source vendor for water meters. The department now requires additional water meters, both for residential and commercial properties.

Request: Approval was sought for the quote received from Hydro Specialties for water meters, which includes various sizes to support both residential and commercial needs. The total quote for these meters is $191,395.60.

Motion: Declare Hydro Specialties Company as the only vendor reasonably available for the purchase of Badger water meters and cellular endpoints where compatibility of equipment, components, accessories, and replacements parts is the paramount consideration and the purchase of products, merchandise, or trademarked goods is for resale at a City facility per Idaho Code 67-2808 (2)(a)(ii) and (vii); and accept and approve the quote received from Hydro Specialties company, for quantities of Badger meters and cellular endpoints for a total of $191,395.60; and direct staff to take necessary steps to complete the purchase of Badger replacement and resale parts.

- Moved by: Councilor Larsen
- Second: Council President Burtenshaw
- Vote: Larsen – Yes, Burtenshaw – Yes, Dingman – Yes, Freeman – Yes, Francis - Aye
- All members present voted in favor. Motion carries.

D.2: Transfer of Fire Department Supplies Dispenser to District 91

Municipal Services Director Pam Alexander presented a request to transfer a surplus Fire Department supplies dispenser to District 91. The dispenser, which was previously used by the Fire Department to store medical supplies and medications, was upgraded to a safer storage system. The dispenser is now surplus and has been offered to Compass Academy for a student business project.

Background: The dispenser was listed as surplus several times but did not meet the minimum reserve. A request from a student at Compass Academy was received, asking for the dispenser to be donated for a business project where it would be used for student snacks. This donation is permissible under Idaho Statutes, as the school district is considered a sub-governmental unit.

Motion: Approve the transfer of a Fire Department supplies dispenser to District 91.

- Moved by: Councilor Larsen
- Second: Council President Burtenshaw
- Vote: Freeman – Yes, Burtenshaw – Yes, Francis – Aye, Dingman – Yes, Larsen - Yes
- All members present voted in favor. Motion carries.

D.3: Purchasing a Replacement for Enterprise Resource Planning (ERP) Software

Presentation: Mark Hagedorn, City Treasurer, presented a proposal for the replacement of the City's current Enterprise Resource Planning (ERP) software, which has been in use for 25 years. The software has operational deficiencies, lacks innovation, and has become more difficult to use, requiring manual workarounds such as Excel spreadsheets.

Process Overview: A Request for Proposal (RFP) was issued, receiving ten bids. After extensive research, the project team has selected a platform that best aligns with the City's needs for growth and future technology integration. The proposal includes:

- $3.2 million for implementation costs.
- $300,000 for the first year of maintenance.

Next Steps: Approval of this proposal will allow the development of a Statement of Work (SOW) with the chosen vendor, Strada/SpryPoint. Following the SOW development, which will take approximately three weeks, there will be further negotiations, including terms with attorneys. If there are no significant changes to the scope or cost, the Mayor will sign the final contract. Any substantial changes will require a secondary approval from the City Council.

Council Discussion: Questions were raised by the Mayor regarding the approval process before the final scope is fully developed. The City Treasurer clarified that the vendor needs assurance from the Council to proceed, with an initial estimate being made before detailed terms are finalized.

Motion: Receive the proposal and direct the Core Team to move forward to develop a scope of work with Strada/SpryPoint and replace the ERP software system at a total proposed cost of $3,240,811 for implementation and $306,421 for the annual maintenance cost in Year 1, and to authorize the Mayor and City Clerk to sign all necessary documents upon completion of the SOW.

- Moved by: Councilor Larsen
- Second: Council President Burtenshaw
- Vote: Burtenshaw – Yes, Larsen – Yes, Dingman – Yes, Freeman – Yes, Francis - Aye
- All members present voted in favor. Motion carries.

Break: The meeting took a break and was scheduled to reconvene at 8:45 PM.

E.1: Public Meeting - Appeal of Revocation of the Conditional Use Permit and Reasoned Statement of Relevant Criteria and Standards for U-Pick Red Barn Revoked on 12/17/2024 by the Board of Adjustment

Mayor's Introduction: The Mayor provided an overview of the quasi-judicial process being conducted, emphasizing that the City Council would be acting in the role of an appellate body, akin to a court of appeals. The Council must carefully adhere to City Code, ensuring an orderly process without public testimony and outlined ground rules for the meeting.

City Attorney's Explanation: The City Attorney (Mike Kirkham) clarified that this appeal concerns a decision made by the Board of Adjustment to revoke the Conditional Use Permit for the U-Pick Red Barn on December 17, 2024. The Council would review the appeal based on the record created by the Board of Adjustment, focusing on alleged errors in their decision. The standard of review is not de novo (where the Council would make a new decision), but rather

focused on whether the Board of Adjustment made an error in their decision. The City Attorney highlighted three potential outcomes:

- Sustain the Board of Adjustment's decision (in whole or in part).
- Reverse the decision of the Board of Adjustment (in whole or in part).
- Remand the decision back to the Board of Adjustment with instructions for further action, particularly if new material information was discovered or if it was in the public interest to develop such information.
    - The City Attorney also emphasized that remanding would only occur if the new information was not available or discoverable at the time of the original decision or if it was in the public interest to gather additional information to make a more informed decision.

Conflict of Interest Disclosure: Council President Burtenshaw disclosed that although she has had numerous ex parte conversations with the owners of the U-Pick regarding their CUP over the past 18 months, she does not have a conflict of interest and would be able to make a decision based on the record as established by the Board of Adjustment.

Presentation by Alison Shindurling: Ms. Alison Shindurling, representing the U-Pick Red Barn, asked for the Council's help in reversing the Board of Adjustment's decision to revoke their CUP, which they had spent over a year obtaining. The revocation was due to opening a pizza kitchen without an approved site plan and permit. The appellant admitted all other conditions were met, and the request was to avoid wasting the time, money, and effort already invested by the City staff and U-Pick. Ms. Shindurling described U-Pick Red Barn as a long-standing community tradition, initially a pumpkin patch, and now a cherished event for families. She stated that U-Pick faced many roadblocks, including miscommunications with City staff regarding requirements and permits, with one key issue being the demand for an easement without compensation or improvement from the City. Additional concerns were raised about the City's arbitrary treatment of the business, the rejection of approved site plans, and the impact on future development in Idaho Falls. The appellant argued that the City's process is flawed and that businesses should be encouraged rather than hindered.

Presentation by Rollie Walker: Mr. Rollie Walker, representing the U-Pick Red Barn, addressed the Council regarding the closure of his business and difficulties obtaining permits. He explained that despite meeting the City's conditions for reopening, the business was still shut down, causing confusion. Walker discussed efforts to comply, including working with City attorneys and architects, and raised concerns about inconsistent enforcement, particularly regarding a new site plan requirement. He clarified that the City's approved site plan was from 2021, not 2020, with only two buildings on foundations and the rest portable.

He discussed the development of McNeil Drive, where over $1 million was invested to improve infrastructure, including a road for heavy trucks. However, there were concerns about

the City's request for additional contributions towards Rollandet improvements despite previous investments. The City faces financial constraints and has declined offers from developers to contribute land for road widening.

Walker also shared his frustration over the City's refusal to issue permits, even after meeting the Board of Adjustment's requirements, and reflected on past experiences where private developers, despite facing resistance from the City, made significant contributions to cleaning up a contaminated area. He concluded with a call for better collaboration between the City and private developers to improve infrastructure and fulfill commitments.

Mr. Gary Cooper (Attorney for Appellant) was invited to speak: Mr. Cooper stated that he would wait until the rebuttal.

Presentation by Wade Sanner (Director of Community Development Services): Wade Sanner, the Director of Community Development Services for the City of Idaho Falls, presented that the appeal from U-Pick Red Barn raised two main issues: whether the Board of Adjustment's decision was arbitrary and lacked evidence, and whether the applicant received due process, including proper notice and time to present their case.

The U-Pick farm, originally a pumpkin patch, expanded into an amusement business, leading to complaints from neighbors about noise, traffic, and smells. A CUP was granted under specific conditions, but it was later revoked due to violations, including failure to obtain necessary site plan approvals and building permits.

The applicant argued that the notices for the hearing were inadequate and did not properly explain the reasons for revocation. However, the City clarified that the notices met legal requirements, providing ample time and information for the applicant. The applicant also claimed that the revocation was arbitrary, but the City defended its decision, stating that it was based on noncompliance with zoning and permit requirements.

Issues like unresolved utility easements and the business operating without proper approvals led to a stop-work notice. The Board of Adjustment concluded that the applicant violated the CUP by operating without the necessary permits. While one Board member expressed uncertainty, the decision to revoke the CUP was upheld due to evidence of noncompliance with zoning and safety regulations.

In conclusion, the City followed proper procedures in notifying the applicant, ensuring due process, and enforcing zoning codes. The appeal focused on whether the revocation was justified, with the City's stance being that the applicant's violations were significant enough to warrant the CUP's revocation.

Rebuttal by Mr. Gary Cooper (Attorney for the Appellant): Mr. Cooper, representing the Red Barn, asked the City Council to reverse the revocation of the Conditional Use Permit (CUP) and variances imposed by the Board of Adjustment in December. He argued that the decision was an abuse of discretion, as the applicant was very close to finalizing the required site plan and building permit, with only minor issues left to resolve. Cooper emphasized that the Red Barn

had been working with the City throughout the process, addressing issues as they arose, and had not been shut down by the City because of this cooperation. He explained that while the applicant had been working to meet the requirements, the City added new conditions and paperwork late in the process, making it difficult for the applicant to comply. Cooper argued that it was unfair to revoke the permit when they were so close to resolution and requested that the matter be sent back to the Board of Adjustment to complete the necessary steps. He also pointed out that the Red Barn was a beneficial asset to the city, attracting significant visitors, and urged the Council to support this community-friendly business.

Discussion: During the City Council discussion, Mr. Cooper argued that the revocation of the Conditional Use Permit (CUP) for the Red Barn was unjust, as they were close to meeting all requirements, including the site plan and building permit. He explained delays were due to missing documents, like the easement, but that most conditions were met in December. Council members discussed the possibility of reapplying for the CUP, with Mr. Sanner noting that this would involve a new process, possibly with additional conditions or restrictions. Zoning for the property would not change, but a new CUP would still need to undergo review.

The Council debated how to proceed with the appeal: upholding the Board of Adjustment's (BOA) decision, reversing it, or remanding for further review. Legal concerns raised included whether the BOA had all necessary information when making its decision. The Council also considered a formal request for mediation to resolve the dispute. Mediation, allowed under the zoning code, would need to be scheduled within 28 days of the request, and if it fails, the process would continue.

The Council deliberated on the timing and legal procedures of mediation. They emphasized the importance of prompt decision-making while being open to mediation. In the vote on sustaining the BOA's decision, most Council members supported it, with one vote against. They stressed the need for order in development and public safety and encouraged both parties to approach mediation with an open mind. A hand-written letter (attached) was provided to Council by Mr. Cooper, requesting mediation.

Motion: To amend the agenda for tonight to include a request for mediation - for the consideration of a request for mediation - for U-Pick Red Barn under the good faith reason that we did not know that the mediation request was coming.

- Moved by: Council President Burtenshaw
- Second: Councilor Francis
- Vote: Freeman – Yes, Burtenshaw – Yes, Francis – Aye, Dingman – Yes, Larsen - Yes
- All members present voted in favor. Motion carries.

Motion: Council Ordered Mediation

- Moved by: Council President Burtenshaw

- Second: Councilor Larsen
- Vote: Dingman – Yes, Burtenshaw – Yes, Francis – Aye, Freeman – Yes, Larsen - Yes
- All members present voted in favor. Motion carries.

Motion: Council sustain the decision that the Board of Adjustment made

- Moved by: Council President Burtenshaw
- Second: Councilor Francis
- Vote: Larsen – Yes, Francis – Aye, Dingman – Yes, Burtenshaw – Yes, Freeman - No [Motion carries]

6. Announcements:

- Back for regular Council meetings in a few weeks.
- On February 6th at the Museum of Idaho, there will be an event commemorating the disassembly of the City's water tower and the construction of a new one.
- Finally, there was a personal birthday announcement for Councilor Dingman's husband who spent the evening at home watching the meeting.

7. Adjournment:

There being no further business, the meeting adjourned at 12:04 am, January 31, 2025

_____ _____

Emily Geisler, City Clerk Rebecca L. Noah Casper, Mayor

Gary L. Cooper
Representing the owners
and operators of
Red Barn Request
Mediation

1/30/2025

Gary L Cooper

READ @ CITY COUNCIL BY MAYOR - 01.30.25 @ 11:57pm

City Council Meeting Minutes

680 Park Avenue
Idaho Falls, ID

Thursday, February 13, 2025 | **7:30 PM** | **City Council Chambers**

1. **Call to Order, 7:32 PM**

Present:
Mayor Rebecca L Noah Casper
Council President Lisa Burtenshaw
Councilor Jim Francis
Councilor Jim Freeman
Councilor Kirk Larsen
Councilor John Radford
Councilor Michelle Ziel-Dingman

Also present:
Michael Kirkham, City Attorney
Emily Geisler, City Clerk
Wade Sanner, Community Development Services Director
Ian Turner, Airport Director
Pam Alexander, Municipal Services Director
Chris Fredericksen, Director of Public Works
Wid Ritchie, Customer Service Manager, Idaho Falls Power
Reece Lawley, Idaho Falls Power

2. **Pledge of Allegiance**

Mayor Casper led those present in the Pledge of Allegiance.

3. **Public Comment**

No one appeared.

4. **Consent Agenda**

<u>Airport</u>
1. Request to approve the award for a Professional Services Agreement for Parking and Revenue Control Equipment to DGM Systems

<u>Municipal Services</u>
1. Request to approve the quote from VLCM for new software to monitor network traffic

<u>Public Works</u>
1. Request to approve the bid award to HK Contractors for the 49th South from Providence Point to Stanfield Lane Expansion

Motion: Approve, accept or receive all items on the consent agenda according to the recommendations presented.
- Moved by: Council President Burtenshaw
- Second: Councilor Larsen

- Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw – Yes
- All members voted in favor. Motion carries.

5. Regular Agenda

A. Community Development Services

1. Final Plat and Reasoned Statement of Relevant Criteria and Standards, Fanning Park Division No. 1, First Amended **CDS 25-145**

Presentation/Discussion (Councilor Larsen):
The discussion revolves around a proposed replatting of an existing property consisting of old, long, thin lots. The owner seeks to consolidate these into two larger, nearly equal-sized lots. The plan includes housing on both the north and south sides, with a public street in the center providing ingress and egress.

Motion 1: Accept or Approve the Final Plat for Fanning Park Division No. 1 First Amended and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat.

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Freeman – Yes, Francis – Aye, Larsen – Yes, Radford – Aye, Burtenshaw – Yes, Dingman – Yes
- All members voted in favor. Motion carries.

Motion 2: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Fanning Park Division No. 1, First Amended and give authorization for the Mayor to execute the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw - Yes
- All members voted in favor. Motion carries.

2. Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards, Fairway Estates Division No. 26 **CDS 25-146**

Presentation/Discussion (Wade Sanner):
The discussion concerns the final plat approval for a new subdivision in Fairway Estates, specifically Division 26. A key point of concern was a long-anticipated connection to the east, which is necessary for fire safety and overall traffic flow. The project includes 31 lots (30 residential and one detention area) and falls within the airport overlay zone.

A major focus was on the connection over the Idaho Canal via a bridge, which has already been built, while the road (Sage Lakes Boulevard) is expected to be constructed in the coming spring. Councilor Radford questioned how the new road would connect to Lewisville Highway, including whether the developer or the City would bear costs for road widening. Chris Fredericksen confirmed that the developer would handle some widening, including adding a southbound right-turn lane and a northbound left-turn pocket.

Radford and Fredericksen and Councilor Freeman also discussed annexation, road jurisdiction, and speed limits. Since the annexed section of Lewisville Highway falls under City control, the Council considered reducing the speed limit from 55 to 45 mph (requested by Freeman) to accommodate growth and increased traffic. The final motion was prepared after ensuring all concerns, particularly regarding annexation and road access, were addressed.

Motion 1: Approve the Development Agreement for the Final Plat for Fairway Estates Division No. 26 and give authorization for the Mayor and City Clerk to sign said agreement.

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Freeman – Yes, Francis – Aye, Larsen – Yes, Radford – Aye, Burtenshaw – Yes, Dingman - Yes
- All members voted in favor. Motion carries.

Motion 2: Accept or Approve the Final Plat for Fairway Estates Division No. 26 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat and grant the block length variance.

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw – Yes
- All members voted in favor. Motion carries.

Motion 3: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Fairway Estates Division No. 26 and give authorization for the Mayor to execute the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Dingman – Yes, Radford – Aye, Francis – Aye, Burtenshaw – Yes, Larsen – Yes, Freeman – Yes
- All members voted in favor. Motion carries.

B. Airport:
   1. Resolution – Accepting the Grant Offer of the Idaho Transportation Department, Division of Aeronautics Airport Aid Program, FS Program# F258IDA, Project# AIP046, and Statement of Acceptance **AIRPORT 25-153**

      Presentation/Discussion (Ian Turner):
      The discussion focused on accepting a $15,000 grant from the Idaho Transportation Department's Division of Aeronautics to support terminal expansion at the airport. Mayor Casper started a conversation comparing Idaho's airport funding with Utah's, specifically Provo's airport, which has received significantly larger state and local financial support. The contrast highlighted the challenges of securing funding in Idaho, where state and local infrastructure investment in commercial airports is much lower. The Mayor acknowledged the airport director's efforts in securing funding and expressed hope for stronger statewide support in the future.

      Motion: Approve the resolution accepting an Idaho Airport Aid Program grant offer to the Idaho Falls Regional Airport from the Idaho Transportation Department - Division of Aeronautics to expand the terminal.
      - Moved by: Council President Burtenshaw
      - Second: Councilor Radford
      - Vote: Burtenshaw – Yes, Larsen – Yes, Dingman – Yes, Radford – Aye, Freeman – Yes, Francis - Aye
      - All members voted in favor. Motion carries.

C. Municipal Services:
   1. IF 25-008, 2025 Commercial Water Meter Materials for Public Works **MS 25-147**

      Presentation/Discussion (Pam Alexander):
      The discussion focused on the approval of a purchase for 2025 commercial water meter materials to support the City's water division. The total cost of the materials is $402,857.66, with bids awarded to Core & Main and Ferguson Waters as the lowest responsible bidders. The bid tabulation was extensive, containing detailed information on the items. The Council members acknowledged the complexity of the bid documents but did not express concerns.

      Motion: Accept and approve the bids from the lowest responsive and responsible bidders by section to Core and Main and Ferguson Waters for a total of $402,857.66.
      - Moved by: Councilor Larsen
      - Second: Council President Burtenshaw
      - Vote: Radford – Aye, Freeman – Yes, Burtenshaw – Yes, Francis – Aye, Dingman – Yes, Larsen – Yes
      - All members voted in favor. Motion carries.

D. Public Works:

1. Federal Highway Administration (FHWA) Carbon Reduction Program Funding Agreement **PW 25-150**

Presentation/Discussion (Chris Fredericksen):
The Council is considering a funding agreement with the Idaho Transportation Department for Federal Highway Administration Carbon Reduction Program funds. If approved, $203,000 will be allocated to purchase at least four hybrid vans for the City's GIFT micro-transit program. These vans, owned by the City and operated by Downtowner, will help reduce costs and improve service flexibility. The funding requires a 7.34% match, approximately $15,000, which is already secured. The program operates on a reimbursement basis, meaning costs must be paid upfront before reimbursement. At the request for clarification from Councilor Radford, Fredericksen explained that the hybrid vans use both gas and electric power, with regenerative braking aiding efficiency in city driving. The Council discussed the feasibility of fully electric alternatives and confirmed that sufficient funds are available for the purchase and reimbursement process. Mayor Casper pointed out a duplication error on the memo.

Motion: Approve the FHWA Carbon Reduction Program Funding Agreement with the Idaho Transportation Department that will provide for the purchase of four or more electric-hybrid drivetrain vans to be used by Greater Idaho Falls Transit (GIFT) and authorize the Mayor to sign the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Francis
- Vote: Larsen – Yes, Francis – Aye, Radford – Aye, Dingman – Yes, Burtenshaw – Yes, Freeman – Yes
- All members voted in favor. Motion carries.

2. Bid Award - Anderson Street Water Line Upgrades, Holmes Avenue to North Boulevard **PW 25-152**

Presentation/Discussion (Chris Fredericksen):
The Council is considering awarding a bid for the Anderson Street Water Line Upgrades between Holmes Avenue and North Boulevard. The project will replace approximately 3,100 linear feet of aging 1960s-era cast iron water pipes and install 700 additional feet of new mainline. This work is being completed ahead of a federally funded pavement rehabilitation project that will also replace the traffic signal at North Boulevard and Anderson Street. Two bids were received, with HK Contractors submitting the lowest bid at $1,604,007. Public Works recommends awarding the contract. Council members acknowledged the strategic planning to minimize disruptions by coordinating the water line replacement with upcoming roadwork, ensuring efficiency and cost-effectiveness. The City has over 300 miles of water lines.

Motion 1: Approve the plans and specifications; award to the lowest responsive, responsible bidder, HK Contractors, Inc., in the amount of $1,604,007.00; and give authorization for the Mayor and City Clerk to execute the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Francis
- Vote: Larsen – Yes, Burtenshaw – Yes, Dingman – Yes, Freeman – Yes, Francis – Aye, Radford - Aye
- All members voted in favor. Motion carries.

E. Idaho Falls Power:

1. IFP 25-05 FHWA Charging and Fueling Infrastructure Grant - Idaho Falls Electric Vehicle (EV) Chargers - Blink Network, LLC **IFPower 25-148**

Presentation/Discussion (Wid Ritchie):
The Council is considering approval of a $1,451,616 purchase of electric vehicle (EV) charging equipment from Blink Network, LLC, funded through a Federal Highway Administration Charging and Fueling Infrastructure Grant. This project will install EV chargers at four locations along the I-15 corridor, including Freeman Park, Johns Hole Memorial Drive, and the Idaho Falls Power north parking lot. Each site will have four DC fast chargers and two Level 2 chargers. After reviewing 17 vendor proposals, Blink Network was selected as the most cost-effective and high-quality option. The project is grant-funded and already budgeted, with installation expected to begin this summer and completion anticipated by this coming fall.

Motion: Accept and approve Blink Network, LLC's proposal to supply NEVI-compliant EV charging equipment at the not-to-exceed cost of $1,451,616.00.

- Moved by: Councilor Freeman
- Second: Councilor Dingman
- Vote: Freeman – Yes, Radford – Aye, Burtenshaw – Yes, Francis- Aye, Dingman – Yes, Larsen - Yes
- All members voted in favor. Motion carries.

6. **Announcements**:

- Mayor Casper reminded everyone that the upcoming Monday is Presidents' Day, and City offices will be closed.
- A work session is scheduled for the following Tuesday, and the next Council meeting will be in two weeks.
- BMPO Policy Board's next meeting will be held in March.
- The Master Plan Open House is scheduled for February 20th at the Skyline Activity center for the airport.

- Airport Director Ian Turner will be speaking at the Idaho Falls City Club next week, as well.

7. **Adjournment:**
   There being no further business, the meeting adjourned at 8:10 PM

/s/ Emily Geisler
Emily Geisler, City Clerk

/s/ Rebecca L. Noah Casper
Rebecca L. Noah Casper, Mayor

City Council Meeting Minutes

680 Park Avenue
Idaho Falls, ID

Thursday, February 27, 2025 | **7:30 PM** | **City Council Chambers**

1. Call to Order: 7:33 pm

Present:
Mayor Rebecca L Noah Casper
Councilor Jim Freeman
Councilor Kirk Larsen
Councilor John Radford
Councilor Michelle Ziel-Dingman

Absent:
Council President Lisa Burtenshaw
Councilor Jim Francis

Also present:
Pam Alexander, Municipal Services Director
Jeremy Galbreaith, Deputy Chief of Police
Michael Kirkham, City Attorney
Callie Avondet, Resident
Paul Radford, Deputy Fire Chief
Chris Fredericksen, Public Works Director
Emily Geisler, City Clerk
Karla Ashton, Resident

2. Pledge of Allegiance

Councilor Dingman led those present in the Pledge of Allegiance.

3. Public Comment

Callie Avondet and Karla Ashton – Residents of Idaho Falls

This public comment proposed commissioning a statue of Rebecca Brown Mitchell, an influential historical figure in Idaho Falls (formerly Eagle Rock). The speakers highlighted Mitchell's contributions, including founding the City's first school and church, advocating for women's suffrage, and working on prison reform. She also lobbied the State legislature to raise the age of consent for girls from 10 to 18. Ms. Avondet and Ms. Ashton have conducted extensive research, consulted experts, and identified potential sculptors. They request City support in securing land for the statue, while they handle fundraising. The Mayor and Council acknowledged the proposal, expressing appreciation and a commitment to reviewing it. The speakers provided an informational handout (attached).

4. Consent Agenda

A. Office of the Mayor
   1. **25-169** Request for consent of the appointment of Edwin Phillips to the Shade Tree Committee

B. Municipal Services
   1. **25-154** Receive and Review the Treasurer's Report for December 2024

2. **25-163** Accept and Approve the bids for Bid #011 for the Brodbecks Addition Water Line Improvements 2025
3. **25-164** Accept and Approve the bids for BID #012 for Multiple City Water Projects Material
4. **25-165** Accept and Approve the bids for BID #013 for the Well #3 Elevated Water Line Material
5. **25-167** Accept and Approve the bids for BID #010 for the Anderson Project Materials

C. Public Works
1. **25-158** Approve the plans and specs and award a bid to HK Contractors for the 49th South & Holmes Avenue Intersection Water Line for $115,982

D. Idaho Falls Power
1. **25-166** Approve the purchase of Transformer Pads & Ground Sleeves for $123,490.59

E. Office of the City Clerk
1. **25-123** Approve the minutes from the January 13, 2025, City Council Work Session
2. **25-162** Review & accept Licensing Reports for Active and/or Issued or Renewed Licenses in January 2025

The Mayor and City Clerk clarified the above-mentioned agenda item to add that these reports will be done once a month – during the second City Council meeting – when the prior month will be reported.

Motion 1: Approve, accept or receive all items on the Consent Agenda according to the recommendations presented.

- Moved by: Councilor Dingman
- Second: Councilor Larsen
- Vote: Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford, Aye
- All members present voted in favor. Motion carries.

5. Regular Agenda

A. Community Development Services
1. **25-156** Final Plat and Reasoned Statement of Relevant Criteria and Standards, CCW Express Broadway, First Amended. (No presentation or discussion)

Motion 1: Accept or Approve the Final Plat for CCW Express Broadway, First Amended and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat.

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye
- All members present voted in favor. Motion carries.

Motion 2: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for CCW Express Broadway, First Amended and give authorization for the Mayor to execute the necessary documents. (No presentation or discussion)

- Moved by: Councilor Larsen
- Second: Councilor Radford
- Vote: Freeman – Yes, Larsen – Yes, Radford – Aye, Dingman – Yes
- All members present voted in favor. Motion carries.

B. Municipal Services

1. **25-155** Firefighter turnouts, cooperative purchasing contract.

Presentation/Discussion: Director Alexander and Chief Radford presented a proposal for the approval of firefighter turnout gear, which is essential protective equipment for emergency responders. The purchase, totaling a little over $152,000, will be made through a cooperative purchasing contract with Sourcewell and vendor SeaWestern Fire Fighting Equipment.

The funding includes gear for eight new recruits and a planned replacement cycle for existing firefighters, adhering to a ten-year rotation standard. The cost of turnouts has risen over time, now averaging about $4,500 per set due to technological advancements and increased material costs. Firefighters receive two sets to ensure safety, particularly for reducing exposure to carcinogens, a leading cause of cancer in the fire service. Councilor Freeman pointed out that the two pairs of turnouts was a newer thing, allowing a firefighter to have a clean set to use while the dirty, soot-covered one is cleaned and dried.

Chief Radford emphasized the importance of turnout gear in protecting firefighters from high-heat environments and hazardous substances. The presentation also clarified a minor clerical error in the Council memo, confirming that the item was not an ordinance. The discussion highlighted the significance of updated protective gear and the impact of safety measures on firefighter health.

Motion: Approve the purchase of firefighter turnouts from the Sourcewell cooperative purchasing contract 010424-LIO from SeaWestern Fire Fighting Equipment for a total of $152,431.36 and authorize the Mayor and City Clerk to sign the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Dingman
- Vote: Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford - Aye
- All members present voted in favor. Motion carries.

2. **25-161** Sale of Used Law Enforcement Vehicles to College of Eastern Idaho, Law Enforcement Program.

Presentation/Discussion: Director Alexander and Chief Galbreaith presented a request to sell six used police vehicles to the College of Eastern Idaho (CEI) for $13,000. These vehicles, which would typically be auctioned off, are being sold to support the development of a regional police academy in Idaho Falls. The academy, nearing final approval from the Peace Officer Standards and Training (POST) organization, will serve law enforcement agencies from Bingham County to the Wyoming and Montana borders.

The vehicles, including four Ford Explorers and two Dodge Chargers, from model years 2011-2015, will be used for emergency vehicle operations training, teaching officers how to handle high-speed maneuvers, shift vehicle weight properly, and execute PIT (Precision Immobilization Technique) maneuvers safely. One of the vehicles is specially reinforced for repeated PIT maneuver practice.

Chief Galbreaith highlighted that the academy will allow both hired officers and self-sponsored students to receive training, making them more competitive for law enforcement jobs. Council members acknowledged the importance of this training, especially for emergency responders, and shared past experiences of similar driving courses. The discussion concluded with appreciation for the initiative and its benefits to regional law enforcement training.

Director Alexander pointed out that there was an error in the memo for this agenda item. The four Ford Explorers are valued at $2,500 each. The 2025 Dodge Charger is valued at $2,000 [not $2,500]. The 2023 Charger is valued at $1,000.

Motion: Approve the sale of six used law enforcement vehicles to the College of Eastern Idaho for a total of $13,000 and give authorization for the Mayor and City Clerk to execute the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Dingman
- Vote: Freeman – Yes, Larsen – Yes, Radford – Aye, Dingman - Yes
- All members present voted in favor. Motion carries.

C. Public Works

1. **25-159** State Local Agreement and Resolution with the Idaho Transportation (ITD) for the City Radar Signals.

Presentation/Discussion: Director Fredericksen presented a state local agreement with the Idaho Transportation Department (ITD) for a radar speed sign project. The project involves installing approximately ten radar speed signs on arterial roads transitioning from county to city limits, where speed limits typically decrease. The total cost is just under $400,000, with the City contributing a 7.34% match ($29,100) and an initial $2,000 installment to begin design work.

The signs will help monitor and encourage speed compliance, with data collection capabilities depending on the type installed. The City will collaborate with the police and use traffic counters to determine the most effective locations.

Addressing concerns about potential risks to federal funding due to administrative transitions, Director Fredericksen assured Council that ITD operates on obligational authority, meaning funds are already allocated before projects move forward. This agreement is only for the design phase, with another agreement required before construction begins, further safeguarding the project from funding uncertainties.

Motion: Approve the State Local Agreement and Resolution with the ITD for the City Radar Signs project and authorize the Mayor and City Clerk to sign the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Dingman
- Vote: Larsen – Yes, Dingman – Yes, Radford – Aye, Freeman – Yes
- All members present voted in favor. Motion carries.

2. **25-160** Professional Services Agreement with Stantec Consulting Services to complete a Secondary Treatment Evaluation and Design a CleanB Upgrade at the Wastewater Treatment Plant.

Presentation: Director Fredericksen presented a professional services agreement to address two key needs identified in the City's wastewater facility plan. The first part involves designing a CleanB upgrade, an alternative treatment method projected to save nearly $10 million compared to a conventional digester. The design phase is expected to take 12 months, followed by 12 months of construction.

The second part of the agreement focuses on a secondary treatment evaluation, a 24-month project to model and calibrate the treatment system based on flow characteristics and ongoing dewatering efforts. The contract with Stantec Consulting has a not-to-exceed amount of $652,630.

Director Fredericksen received praise from Council for the City's well-managed and forward-thinking wastewater treatment operations, ensuring compliance and long-term planning for future capacity needs.

Motion: Approve the Professional Services Agreement with Stantec Consulting Services Inc. and authorize the Mayor and City Clerk to execute the necessary documents.

- Moved by: Councilor Larsen
- Second: Councilor Dingman
- Vote: Radford – Aye, Freeman – Yes, Dingman – Yes, Larsen – Yes
- All members present voted in favor. Motion carries.

6. Announcements

1. Idaho Falls Regional Airport Board Meeting – Scheduled for tomorrow at 8 a.m., lasting until approximately 11 a.m., depending on quorum.
2. Former Mayor Tom Campbell's Funeral Services:
   - Viewing: Tomorrow evening (6:30 - 8 p.m.) at Wood Funeral Home, Idaho Falls.
   - Funeral Service: Saturday at 11 a.m. (with a viewing at 10 a.m.) at 2040 Brentwood Drive.
3. Upcoming City Council Meetings:
   - Monday – Council Work Session
   - Thursday – Regular Council Meeting
4. Celebration of Life for Mike Spears:
   - March 8
   - Time: 2 - 4 p.m.
   - Location: Wilkes Funeral Home, Pocatello

7. Adjournment

There being no further business, the meeting adjourned at 8:14 PM

/s/ Emily Geisler_____
Emily Geisler, City Clerk

/s/ Rebecca L. Noah Casper_____
Rebecca L. Noah Casper, Mayor

REBECCA BROWN MITCHELL

- Born January 23, 1834 in Illinois
- Arrived in Eagle Rock, Idaho June 5, 1882
- Founded the first Sunday School June 11, 1882
- Established the first school in Eagle Rock in a shed between two saloons on June 12, 1882
- Built the first church, a Baptist Church, in Eagle Rock in 1884
- Lobbied the Idaho Legislature to:
  - Raise the age of consent for girls from ten to eighteen
  - Secure women's suffrage in Idaho
  - Reform Idaho's prison and parole system
- Traveled the state to gain support for suffrage and the temperance movement
- Became the first woman in the world to be the chaplain of a legislative body-the Idaho Legislature
- Donated her books for the first library in Idaho Falls and was crucial in obtaining a grant from the Carnegie Foundation to build the Idaho Falls Library which is now part of the Museum of Idaho
- "Why not do the unheard of thing?"

2/27/25 Provided to Council by Callie Wondel + Karla Ashton.

REBECCA BROWN MITCHELL

Currently a small fountain monument to her in the Rose Hill Cemetery (needs repair)
Plaque in Library

Actions accomplished:

- Done research on 501C3
- Brainstormed with Jim Francis
- Meeting with Jeff and Chloe at the Idaho History Museum the middle of March.
- Talked with three sculptors and met with two in person. Had a meeting with Janet Galimore, who runs the Idaho State Historical Society (got so much information about the process from start to finish.) She will be a wonderful support through our process.
- Met with Senator Kevin Cook
- Contacted William Forsythe, from FamilySearch to find living relatives

Ideas for the future:

Create by laws and get 501c3 in place.... Hopefully a pass through Committee:

- Fundraising
- Community outreach
- Education
  - 4th grade Idaho History Unit
  - Presentations at the schools
  - essay contests
- Social Media
  - Joint resolution in Boise for a day in her Honor
- Sculpture
  - Path leading to it that is ADA approved
  - Plaque with some info as well as QR code
  - QR code leads to site with stories, facts, etc.
  - Unveiling day...invite dignitaries

Callie S. Avondet
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Karla H. Ashton
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kjhashton@gmail.com

Memorandum

File #: 25-200 **City Council Meeting**

FROM: Emily Geisler, City Clerk
DATE: Friday, March 21, 2025
DEPARTMENT: Mayor's Office

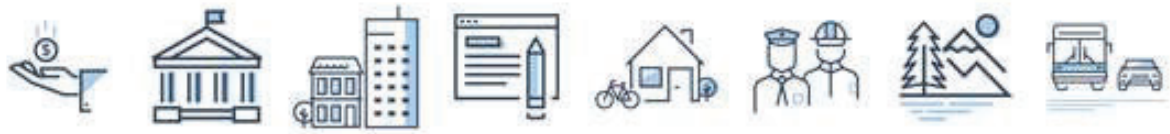
Subject
City Council Work Session Minutes

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the City Council Work Session Minutes from January 27, 2025, and February 18, 2025

Description, Background Information & Purpose
Attached are the following:

- January 27, 2025, City Council Work Session Minutes
- February 18, 2025, City Council Work Session Minutes

Alignment with City & Department Planning Objectives



☐ ☒ ☐ ☐ ☐ ☐ ☐ ☐

The Minutes support the Good Governance community-oriented result by providing assurance of regulatory and policy compliance to facilitate transparency and minimize and mitigate risk.

Interdepartmental Coordination
N/A

Fiscal Impact
N/A

Legal Review
N/A

City Council Work Session Minutes

680 Park Avenue
Idaho Falls, ID 83402

Monday, January 27, 2025	3:00 PM	City Council Chambers

1. Call to Order and Roll Call

Present: Quorum Confirmed

Mayor Rebecca L. Noah Casper
Councilor John Radford
Councilor Jim Freeman
Councilor Kirk Larsen
Council President Lisa Burtenshaw
Councilor Michelle Ziel-Dingman
Councilor Jim Francis

Also present:

Wade Sanner, Community Development Services, Director
Emily Geisler, City Clerk
Pam Alexander, Municipal Services Director
Margaret Wimborne, Chief of Staff
Michael Kirkham, City Attorney
Mark Hagedorn, Finance Manager / Treasurer
Joseph Nilsson, Chief Information Officer, IT
Catherine Smith, Economic Development Administrator

Mayor Casper called the meeting to order at 3:02 p.m. with the following items:

2. Community Development Services

A. Final Plat and Reasoned Statement of Relevant Criteria and Standards, Sunnyside Crossroads Regional Center Division No. 1, First Amended

- **Motion 1**: Accept or Approve the Final Plat for Sunnyside Crossroads Regional Center Division No. 1, First Amended and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat.
  - Moved by: Councilor Radford
  - Second: Councilor Larsen
  - Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw - Yes
  - All members voted in favor. Motion carries.

- **Motion 2**: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Sunnyside Crossroads Regional Center Division No. 1, First Amended and give authorization for the Mayor to execute the necessary documents.
  - Moved by: Councilor Radford
  - Second: Councilor Larsen
  - Vote: Dingman – Yes, Burtenshaw – Yes, Francis – Aye, Freeman – Yes, Larsen – Yes, Radford - Aye
  - All members voted in favor. Motion carries.

B. Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards, The Narrows Division No. 2

- **Council Discussion**: Councilor Francis raised a question regarding a variance for turnaround on Latah Avenue. The Community Development Services Director, Wade Sanner, clarified that the variance is for a block length of 356.22 ft, which is below the required range of 400–1300 ft. The temporary turnaround for fire access was also discussed.

- **Motion 1**: Approve the Development Agreement for the Final Plat for The Narrows Division No. 2 and give authorization for the Mayor and City Clerk to sign said agreement.
    - Moved by: Councilor Larsen
    - Second: Councilor Radford
    - Vote: Freeman – Yes, Francis – Aye, Larsen – Yes, Radford – Aye, Burtenshaw – Yes, Dingman - Yes
    - All members voted in favor. Motion carries.

- **Motion 2**: Accept or Approve the Final Plat for The Narrows Division No. 2 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat and grant the block length variance.
    - Moved by: Councilor Larsen
    - Second: Councilor Radford
    - Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw - Yes
    - All members voted in favor. Motion carries.

- **Motion 3**: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for The Narrows Division No. 2 and give authorization for the mayor to execute the necessary documents.
    - Moved by: Councilor Larsen
    - Second: Councilor Radford
    - Vote: Dingman – Yes, Radford – Aye, Francis – Aye, Burtenshaw – Yes, Larsen – Yes, Freeman - Yes
    - All members voted in favor. Motion carries.

C. Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards, Wood's Crossing Division No. 1

- **Motion 1**: Approve the Development Agreement for the Final Plat for Wood's Crossing Division No. 1 and give authorization for the Mayor and City Clerk to sign said agreement.
    - Moved by: Councilor Radford
    - Second: Councilor Larsen
    - Vote: Burtenshaw – Yes, Larsen – Yes, Dingman – Yes, Radford – Aye, Freeman – Yes, Francis - Aye
    - All members voted in favor. Motion carries.

- **Motion 2**: Accept or Approve the Final Plat for Wood's Crossing Division No. 1 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat.
    - Moved by: Councilor Radford
    - Second: Councilor Larsen
    - Vote: Radford – Aye, Freeman – Yes, Burtenshaw – Yes, Francis – Aye, Dingman – Yes, Larsen - Yes

- All members voted in favor. Motion carries.

- **Motion 3**: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Wood's Crossing Division No. 1 and give authorization for the mayor to execute the necessary documents.
  - Moved by: Councilor Radford
  - Second: Councilor Larsen
  - Vote: Larsen – Yes, Francis – Aye, Radford – Aye, Dingman – Yes, Burtenshaw – Yes, Freeman - Yes
  - All members voted in favor. Motion carries.

D. Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards, Aspen Meadows Division No. 1

- **Council Discussion**: Councilor Francis noted an error in the zoning designation in the packet. The zoning should be LC (Limited Commercial), not R3 as indicated. Director Sanner clarified the issue regarding the zoning map.

- **Motion 1**: Approve the Development Agreement for the Final Plat for Aspen Meadows Division No. 1 and give authorization for the Mayor and City Clerk to sign said agreement.
  - Moved by: Councilor Larsen
  - Second: Councilor Radford
  - Vote: Larsen – Yes, Burtenshaw – Yes, Dingman – Yes, Freeman – Yes, Francis – Aye, Radford - Aye
  - All members voted in favor. Motion carries.

- **Motion 2**: Accept or Approve the Final Plat for Aspen Meadows Division No. 1 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat
  - Moved by: Councilor Larsen
  - Second: Councilor Radford
  - Vote: Freeman – Yes, Radford – Aye, Burtenshaw – Yes, Francis – Aye, Dingman – Yes, Larsen - Yes
  - All members voted in favor. Motion carries.

- **Motion 3**: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Aspen Meadows Division No. 1 and give authorization for the mayor to execute the necessary documents.
  - Moved by: Councilor Larsen
  - Second: Councilor Radford
  - Vote: Burtenshaw – Yes, Larsen – Yes, Radford – Aye, Dingman – Yes, Freeman – Yes, Francis - Aye
  - All members voted in favor. Motion carries.

E. **Final Plat and Reasoned Statement of Relevant Criteria and Standards, Boss Park**

- **Council Discussion**: The name Boss Park was chosen as the state dictates that you cannot have subdivisions with duplicate names. The original proposed name was Alturas Park.

- **Motion 1**: Accept or Approve the Final Plat for Boss Park and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat.
    - Moved by: Councilor Radford
    - Second: Councilor Larsen
    - Vote: Larsen – Yes, Radford – Aye, Francis – Aye, Dingman – Yes, Burtenshaw – Yes, Freeman - Yes
    - All members voted in favor. Motion carries.

- **Motion 2**: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Boss Park and give authorization for the Mayor to execute the necessary documents.
    - Moved by: Councilor Radford
    - Second: Councilor Larsen
    - Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw - Yes
    - All members voted in favor. Motion carries.

F. **Final Plat and Reasoned Statement of Relevant Criteria and Standards, Carney Village Division No. 1**

- **Motion 1**: Accept or Approve the Final Plat for Carney Village Division No. 1 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat.
    - Moved by: Councilor Larsen
    - Second: Councilor Radford
    - Vote: Dingman – Yes, Burtenshaw – Yes, Francis – Aye, Freeman – Yes, Larsen – Yes, Radford - Aye
    - All members voted in favor. Motion carries.

- **Motion 2**: Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for Carney Village Division No. 1 and give authorization for the Mayor to execute the necessary documents.
    - Moved by: Councilor Larsen
    - Second: Councilor Radford
    - Vote: Freeman – Yes, Francis – Aye, Larsen – Yes, Radford – Aye, Burtenshaw – Yes, Dingman - Yes
    - All members voted in favor. Motion carries.

3. <u>Municipal Services: ERP Update and Recommendation (Mark Hagedorn, Margaret Wimborne, Joseph Nilsson)</u>

The discussion revolves around the city's initiative to replace its outdated Enterprise Resource Planning (ERP) system with a more integrated solution, addressing inefficiencies in payroll, budgeting, and accounts payable. The project aims to consolidate these functions into a cohesive system, with Workday selected for its modern technology and integration capabilities.

Key points include:

1. **Project Overview**: The City seeks to streamline operations by transitioning to Workday, which includes both financial and human resources systems. The implementation will occur in phases: the first focusing on financials and payroll, and the second on utility billing and customer information systems.
2. **Project Structure**: The project is led by a steering committee and an ERP core team, with involvement from external consultants (Whitlock) for quality assurance. The plan is to gradually phase out existing software and move as many functions as possible into Workday over time.
3. **Costs and Funding**: The estimated implementation cost is $3.5 million for the first year, with funding from an internal loan to preserve capital for other projects. A 5% contingency has been allocated to cover potential cost overruns, and the project will require ongoing training and conference participation to ensure success.
4. **Timeline and Resources**: The transition will take several years, with full-time staff and consultants dedicated to the project. There will be a focus on keeping the project on track with regular updates and a clear timeline. While Workday will not immediately replace all systems, the goal is to reduce manual labor, improve efficiency, and allow the City to focus more on strategic goals.
5. **Long-term Benefits**: Despite the upfront costs, the system is expected to generate long-term savings by streamlining operations and enhancing workflow efficiency, ultimately leading to better strategic management for the city.

The overall approach emphasizes caution, careful resource allocation, and strategic planning to ensure the project's success.

4. Office of the Mayor

A. Idaho Falls Community Survey Update (Margaret Wimborne)

The discussion centers on a community survey funded by ARPA money, aimed at gathering resident feedback on city services. Managed by Polco, the survey will cover areas such as parks, recreation, childcare, and the airport, with some custom questions based on local needs. Initially sent to 3,500 randomly selected households, the survey will later be open to the entire community. Results will be presented to the City Council in March or early April, with separate analysis for the initial postcard recipients and open participants to ensure statistical validity.

A Councilor Radford suggested adding a question about safety concerns in the downtown area, particularly at night.

The survey aims to become a recurring effort, potentially conducted annually or bi-annually, to monitor community needs and service performance. There is also a discussion on the inclusion of demographic questions, which, despite concerns, are considered valuable for understanding different community perceptions and needs, such as safety concerns between renters and homeowners or differences across age groups and cultural communities.

B. City-Related Legislation (Catherine Smith)

The discussion focuses on several proposed bills and their potential impacts on public safety, community trust, and local governance:

1. **House Bill 2**: Proposes increasing the threshold for statewide ballot initiatives to 60%. While widely supported in the legislature, the position of the Association of Idaho Cities (AIC) is still under review.
2. **House Bill 6**: Expands the Attorney General's powers regarding elected officials, which AIC supports due to its emphasis on transparency.
3. **House Bill 7**: Introduces penalties for marijuana possession in small quantities, despite concerns about rising drug cases involving fentanyl and methamphetamine. AIC supports the bill.
4. **House Bill 11**: Establishes new offenses related to illegal entry and reentry into Idaho, raising concerns about local police involvement in immigration enforcement, which could damage trust within immigrant communities, particularly the Hispanic population.

Mayor Casper spoke to concerns that were raised about the role of local police in immigration enforcement, which could deter individuals from reporting crimes, especially in immigrant-heavy neighborhoods. The discussion emphasizes that local police should focus on public safety and not be involved in federal immigration issues, as Idaho Falls lacks its own jail and relies on county facilities.

Additionally, there are discussions on other bills:

- **House Bill 17**: Provides funding for wildfire risk mitigation, benefiting cities by reducing insurance risks.
- **House Bill 18**: Prevents local governments from mandating electric vehicle chargers, which the AIC opposes due to its preemption of local decision-making.
- **House Bill 33**: Allows public notices to be posted electronically, saving cities money and improving effectiveness, especially in areas without local newspaper delivery.

The overall theme is balancing public safety, maintaining local autonomy, and ensuring that proposed legislation aligns with the best interests of Idaho communities.

5. <u>Mayor and Council: Calendars, Announcements, Events, Reports, Updates, Concerns, Questions, and Discussion:</u>

Mayor Casper:

- Water Summit Discussion
    - Brief overview of items on the calendar.
    - Asks if anyone wants to discuss specific items like the Water Summit or city officials and capital.
    - Water Summit Feedback
        1. Highlights the impressive participation of Lieutenant Governor Bedke.
        2. Notes that discussions about wildfire mitigation were valuable for the audience.
        3. Comments on the overall improvement of the AIC meeting's content.
- Historic Preservation Plan
    - Mentions the Idaho Falls Historic Preservation Plan being developed.
    - Shares positive feedback from attendees about the thoughtful, structured approach to preserving history.
    - Discusses conversations about having an official city historian or comprehensive city history.
- Thursday's Council Meeting
    - Gives a preview of the agenda, mentioning 19 memos on the consent agenda.
    - Mentions the appeal hearing and requests preparation for the hearing.

City Attorney (Mike Kirkham):

- Appeal Hearing Procedure
  - Explains the review process and the narrow focus on errors made by the Board of Adjustment.
  - Advises the Council not to accept new materials or testimony.
  - Clarifies the role of the Council in considering whether the Board made an error.
- Recusal Guidelines
  - Provides guidance on recusal if there's a financial or conflict of interest.
  - Offers availability to discuss potential conflicts with any council members privately.
- Appeal Details
  - Describes the process for the appeal hearing, how the appellant and staff will present their cases, and the options the Council has (affirm, reverse, or remand).
  - Mentions a recent Supreme Court ruling emphasizing the importance of adhering to zoning codes.
  - Offers advice on how to manage presentation times during the appeal.

Council President Burtenshaw:

- Council Retreat
  - Updates on the retreat's schedule (from 8 a.m. to 3 p.m., aiming to end after lunch).
  - Confirms changes to the calendar.

Councilor Freeman: Nothing to add

Councilor Dingman:

- Public Transportation Advisory Council (TAC)
  - Mentions open appointments for TAC and the timeline for applications.

Councilor Radford: Nothing to add

Councilor Francis:

- Shares that South Boulevard is scheduled for an overlay, with stripes to be returned to their current configuration.
- Updates on the establishment of a statue for Rebecca Mitchell, a notable figure in city history.
  - Suggests this project aligns with the city's historic preservation goals.

Councilor Larsen:

- Skyline Overlay and Parking Discussion
  - Updates on the plan to overlay part of Skyline and the potential for parking adjustments.
  - Encourages colleagues to reach out to Director Fredericksen for input on options for Skyline and International Way parking.

6. Executive Session:

Executive Session: The Executive Session is being called pursuant to the provisions of Idaho Code Section 74-206 (1) (b) to consider the evaluation, dismissal or disciplining of, or to hear complaints or charges brought against, a public officer, employee, staff member or individual agent, or public school student. The Council will not reconvene after the executive session.

- Moved by: Councilor Francis

- Second: Council President Burtenshaw
- Vote: Francis – Aye, Dingman – Yes, Freeman – Yes, Larsen – Yes, Radford – Aye, Burtenshaw - Yes
- All members voted in favor. Motion carries.

Called to Order at 5:58pm

Roll Call

Present: Mayor Rebecca L. Noah Casper
Council President Burtenshaw
Councilor Dingman
Councilor Francis
Councilor Freeman
Councilor Larsen
Councilor Radford
Margaret Wimborne, Chief of Staff
Darin Jones, HR Director
Michael Kirkham, City Attorney

Adjourned at 7:50pm

_____
Emily Geisler, City Clerk

_____
Rebecca L. Noah Casper, Mayor

City Council Work Session Meeting Minutes

680 Park Avenue
Idaho Falls, ID 83402

Tuesday, February 18, 2025 **3:00 PM** **City Council Chambers**

Call to Order and Roll Call
There were present:

Mayor Rebecca L. Noah Casper
Council President Lisa Burtenshaw
Councilor John Radford
Councilor Ziel-Dingman
Councilor Jim Freeman
Councilor Jim Francis
Councilor Kirk Larsen

Also present:

Pam Alexander, Municipal Services Director
Mark Hagedorn, Finance Manager / Treasurer
Duane Nelson, Fire Chief
Brooks Slyter, Assistant Finance Manager
Wade Sanner, Community Development Services, Director
Michael Kirkham, City Attorney
Emily Geisler, City Clerk

Mayor Casper called the meeting to order at 3:02 p.m. with the following items:

Municipal Services (Mark Hagedorn, Pam Alexander, Brooks Slyter): Quarterly Financial Report with Audit Update

The municipal services quarterly financial report covered key financial topics, including cash balances, investments, budget-to-actual analysis, the American Rescue Plan Act (ARPA) update, and an audit status.

Financial Overview:
City Treasurer Mark Hagedorn reported increasing overall cash balances, driven mainly by enterprise funds. The general fund remains stable with gradual growth, while street funds have risen significantly due to state funding. Recreation and ambulance services now maintain positive cash flow, though golf finances are under review for potential misreporting. Bond drawdowns, impact fees, and tax payments were identified as key cash flow influencers. Certain funds, such as self-insurance and stabilization, grew due to Council-approved allocations. Notably, impact fees have shifted from single-family to multi-family developments, though major project spending remains paused. The Council discussed enhancing financial reporting with internal loan tracking and improved graphical data representation.

Investment Strategy:
Investment discussions emphasized prioritizing safety, liquidity, and yield:

- **Safety:** The City maintains a diversified portfolio, favoring treasuries, FDIC-insured money markets, and government-backed agency bonds while adhering to strict credit rating requirements for corporate bonds.
- **Liquidity:** A laddering strategy ensures fund availability, with 75% of investments maturing within two years and 25% extending beyond. The City utilizes a mix of certificates of deposit (CDs), callable investments, and the Local Government Investment Pool (LGIP) for flexibility.
- **Yield:** Investments are influenced by Federal Reserve rates, with anticipated rate cuts ahead. Idaho law limits investments to fixed-income bonds, preventing exposure to equities. Policy restrictions include a 25% cap on investments exceeding two years and a 50% limit on unsecured bonds, currently under review.

Revenue & Budget Analysis:
Citywide revenue increased by $6 million compared to the previous year, primarily due to a $7 million power bond draw and a $1 million rise in service charges. Interest revenue has declined due to market fluctuations. General fund revenue stands at 12% in the first quarter, awaiting property tax inflows, while expenditures are at 18%, aligning with expectations. No major financial anomalies were noted, with wages and benefits remaining stable. The City continues structured vehicle replacement and cost allocation planning. Fund transfers are Council-approved and tracked, with a separate fund managing one-time expenditures.

Audit & Compliance:
The finance team remains compliant with ARPA fund obligations, ensuring all funds are obligated by December 31, 2024, and expended by December 31, 2026. The audit process is progressing, with the second of four expected drafts completed. Auditors have tested financial controls and identified a restatement issue involving $12.4 million and $7.7 million in Power and Fiber capital work-in-progress funds, caught internally before auditor review. The final audit is expected by the end of March, with a Council presentation in early April—an improvement over previous years. The finance team has implemented enhanced processes and expects the ERP system to improve issue detection in the future.

The next quarterly financial report will be presented in May. The Council commended the finance team for its efforts and commitment to transparency.

<u>Community Development Services, Fire, and Legal (Wade Sanner, Duane Nelson, Michael Kirkham)</u>**:** Fire Code Density Standards & Definitions

The discussion centered around balancing housing development with fire safety regulations in Idaho Falls, addressing issues related to increased density, updated fire codes, and the impact on multi-family housing. Key points included:

1. **Fire Safety Measures (Duane Nelson)**:
    - Updating fire access road standards to 26 feet, ensuring proper fire truck access.
    - Clarifying turning radius and improving accessibility with ADA-compliant ramps.
    - Requiring exterior doors to ensure accessibility for emergency responders.
    - Revising fire protection systems, including sprinkler requirements, for multi-family housing.
2. **Regulatory Adjustments (Wade Sanner)**:
    - Addressing ambiguities in fire safety codes, including sprinkler requirements for townhomes and apartments.
    - Developing clear definitions for residential housing types (e.g., multi-unit vs. single-family) to ensure safety and compliance.
    - Adjusting zoning and building codes to accommodate changing housing trends, particularly multi-family units and new residential models.

3. **Housing Trends (Wade Sanner)**:
    - An increase in multi-family housing development due to market demand, especially among younger generations.
    - Ongoing review of housing policies and zoning regulations to reflect evolving needs, including worker housing and affordable options.
4. **Zoning and Property Rights (Wade Sanner, Duane Nelson, and Council)**:
    - Discussion on property rights tied to zoning codes and building permits, and how changes may affect developments.
    - Potential moratorium to pause developments if safety risks arise from outdated codes.
    - Emphasis on phased developments and the complexities of adapting to changing standards.

The goal is to update regulations for safety, clarity, and alignment with market trends while considering developer feedback and ensuring future housing needs are met.

Mayor and City Council: Calendars, Announcements, Events, Reports, Updates, Concerns, Questions, and Discussion

Mayor Casper:

1. **BMPO Meeting**: A reminder about the BMPO meeting tomorrow.
2. **Mike Simpson's Rotary Speech**: Mike Simpson is the Rotary speaker tomorrow at noon, with a limited number of seats.
3. **Council Budget Retreat**: The Council will have a budget retreat on Friday, where they'll review department priorities, discuss aspirations, and refine them. A working agenda has been shared.
4. **Community Survey**: The public community survey has been sent out, and there's encouragement to share it via email or social media for broader participation.
5. **Legislation**:
    - **Solid Waste Bill**: A bill about "flow control" in solid waste management may impact how waste is disposed of.
    - **Urban Renewal**: A bill would allow cities to dissolve redevelopment agencies, with public approval required for reinstating them and would also allow fire and ambulance districts to opt out. Schools have already opted out.
    - **Flag Display Bill**: A bill could limit flag displays by governmental entities.
    - **Teton Dam Study**: A bill asking the federal government to reconsider the Teton Dam for water storage.
    - **Medicaid Expansion**: A bill relating to Medicaid expansion's impact on ambulance services.
    - **Fireworks Bill**: A bill allowing aerial fireworks to be sold alongside other types, with concerns about safety.
6. **Community Support**: A personal note about the passing of Jackie Flowers' husband and the challenges his family faces in continuing his local businesses.

The session also mentions various bills that may impact local governance and safety, highlighting opportunities for testimony and further discussion.

Council President Burtenshaw:

Discussion of an upcoming airport open house scheduled for the evening of the 20th at the Activity Center, starting at 6:00 PM. The event will be a self-guided tour of the airport plan, without a formal presentation or public input session. Public input has already occurred. The FAA has not yet signed off on the plan, as this is part of the process, and the Council is not the final decision-maker. Council President Burtenshaw confirmed there were no additional updates.

Councilor Freeman:

Councilor Freeman reminded everyone that the fire department recently added eight new recruits who are currently undergoing a five-week academy. The recruits are learning various skills, including starting IVs. Additionally, many Council members and the Mayor will be in Washington, DC, early next week.

Councilor Dingman: Nothing to Report

Councilor Radford:

There was an update regarding the library, stating that several major publishers have filed a lawsuit against the Idaho Library Buildings Act, and this is currently being challenged.

Councilor Francis: Nothing to Report

Councilor Larsen:

Public Works will hold an open house to discuss the construction impacts of the Broadbeck Addition Water Line improvement project. The event will take place tomorrow at 6 p.m. at the Education Center. Residents impacted by the project have been notified. The project is located south of 17th Street, specifically around 22nd, 23rd, and 24th Streets.

Meeting Adjourned at 5:54 PM

/s/Emily Geisler
Emily Geisler, City Clerk

/s/Rebecca L. Noah Casper
Rebecca L. Noah Casper, Mayor

Memorandum

File #: 25-201 **City Council Meeting**

FROM: Emily Geisler, City Clerk
DATE: Monday, March 24, 2025
DEPARTMENT: Mayor's Office

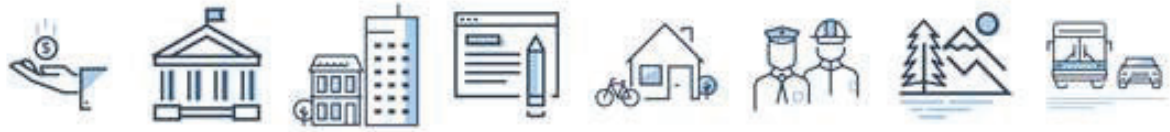
Subject
City Council Meeting Minutes-2025 Budget Retreat

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the City Council meeting minutes from February 21, 2025 Budget Retreat

Description, Background Information & Purpose
Attached are the following:

- February 21, 2025, City Council meeting minutes-Budget Retreat

Alignment with City & Department Planning Objectives



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The Minutes support the Good Governance community-oriented result by providing assurance of regulatory and policy compliance to facilitate transparency and minimize and mitigate risk.

Interdepartmental Coordination
N/A

Fiscal Impact
N/A

Legal Review
N/A

Meeting Minutes:
City Council Special Meeting

Budget Retreat

Friday, February 21, 2025
8:30am

City Council Chambers
City Annex Building
680 Park Ave
Idaho Falls, Idaho

Called to Order at 8:36am

Roll Call

Present:	Mayor Rebecca L. Noah Casper	Council President Lisa Burtenshaw
	Councilor John Radford	Councilor Ziel-Dingman
	Councilor Jim Freeman	Councilor Jim Francis
		(**Quorum confirmed)**

Also Present: Emily Geisler, City Clerk
Michael Kirkham, City Attorney
Margaret Wimborne, Chief of Staff

Review, Evaluation and Discussion: 2024-25 City Priorities

- **Looking Back on 2024 -2025 Budget Redesign** (Presented by Mayor Casper)
    - City leaders initiated a significant revision of the budget-setting process with several objectives in mind:
        - Improve the quality of City Council involvement in the budget process
        - Produce department budgets centered upon the City's established priorities
        - Fully integrate the aspirations, embodied in the City's Strategic Plan, into each department budget
    - This resulted in:
        - Department budgets developed by Directors with a substantial shared understanding of an established strategic vision, key plans, and aspirations for the community which facilitates a more unified and purpose-driven leadership from all City officials.
        - Competition for scarce resources being a little less fierce and not as uncertain

        - Council members difficult choices regarding taxation, wages & benefits, fee setting, etc. made with a better understanding
        - Council members having better oversight by using year-round budgeting mechanisms, such as quarterly financial reports and departmental focus reports

- **City Council Priorities** (Group Discussion)
    - The previously set list of priorities by department was reviewed, with a decision made to "check it off", mark as "ongoing", put an "emphasize" on the item, or "retain".

<u>COMMUNITY DEVELOPMENT SERVICES</u>:

- Expedite Permitting and Review Process Improvement – ***Ongoing & Emphasize***
    - Prioritize improvement of strained relations with development community
    - Address interdepartmental accountability when it comes to incorrect, incomplete, and finger-pointing answers given to developers
        - Discussion Notes: (Margaret Wimborne) There has been coordination happening between different departments to streamline workflow. We need to identify some metrics on what success looks like and work on community outreach. Need to work on customer service.
- Improve Housing Options in Idaho Falls – ***Ongoing & Emphasize***
    - Consider affordability
    - Create "interesting" neighborhoods through zoning and other tools to encourage development of more than just suburban living
    - Improve supply of all types
        - Discussion Notes: (Margaret Wimborne) Because of the market, it makes this hard. May need to revisit/modify the priority of the actions or the intention. (Francis) We did modify the R3A zone. (Burtenshaw) We need to meet with developers to find out what is creating roadblocks. (Radford) Can do research across the country and see what works elsewhere.

<u>FIRE:</u>

- Regional Training Center – ***Ongoing***
    - Include IFPD amenities where possible
        - Discussion Notes: (Mayor) We knew this would be a multi-year process.
- Put forth a plan for Northside Station – ***Check Off***
- City/County Fire District Relationship – ***Ongoing***

HUMAN RESOURCES:

- Promote a Culture of Accountable Public Service – ***Check Off***
  - Inform employee understanding of employment accountability
  - Create accountability by training supervisors
    - Discussion Notes: (Dingman) We have seen a new leadership style which has implemented supervisor training. The new performance management system (done online) makes tracking easier. There is also an employee recognition program.
- Develop a Health Insurance and Benefits Sustainability Program – ***Check Off***
  - Explore new broker, new provider relationships
  - Consider self-insurance options
    - Discussion Notes: (Dingman) Recognizes that the market controls this. Each year the HR team has brought us the best option. This is revisited each year.

MUNICIPAL SERVICES:

- Budget Process Improvements – ***Ongoing***
  - Need to develop budget accountability
  - Consider centralization of budget numbers presentation – done by Municipal Services with department(s) available to explain programmatic elements of requests
- Develop a Building Stewardship Plan – ***Ongoing & Check Off***
  - Include repair and maintenance plans, replacement schedules, general landscaping and snow removal services
  - Clarity regarding who pay and who provides
  - Include 2025 construction start on the Frontier Center expansion

PARKS AND RECREATION:

- Community Center with Emphasis on Amenities that Build Community – Not Just Fitness – ***Ongoing & Retain***
  - Emphasis on amenities that build community – not just fitness
    - Discussion Notes: (Mayor) Still very much in process. (Dingman) Should remain a priority in order to not send the wrong message to the public.
- Right-Size User Fees – ***Check Off***
  - Scrutinize the City's relationships with non-city users
    - Discussion Notes: (Dingman) The softball program was recently looked at and a decision was made to end tournaments.
- Pursue Implementation of Existing Plans for Facilities – ***Ongoing***
  - Heritage, Tautphaus, Zoo, Funland, Trails, etc.
    - Discussion Notes: (Dingman) Use the plan we have – don't pay for another one.

POLICE:

- Community Neighborhood Policing Now – ***Ongoing***
  - Identify key metrics for this
  - Presence reduces fear and promotes safety
  - Develop neighborhood relationships
    - Discussion Notes: (Mayor) Some officers were hired with this in mind. (Freeman) The city has been divided into districts, creating a better focus. We continue to see outreach within the community. (All) Should modify the title of this to remove "now".
- Code Enforcement – More Eyes and More Citations – ***Ongoing & Check Off***
  - Develop an app and offer training to make it easy for patrol, parks and rec, and public works employees to report problems
  - Develop messaging to make the community aware of City standards
    - Discussion Notes: (Freeman) Added people and reorganized to better address. There is a reporting area on the website with training given to some city employees.

PUBLIC WORKS:

- Transportation Focus – ***Ongoing & Check Off***
  - Develop financial sustainability plan for GIFT
  - Safe streets and bridges
  - Design and implement multi-modal streets
  - HCRWS
    - Discussion Notes: (Francis) Keeping GIFT financed is ongoing. (Burtenshaw) Pancheri is done. (Francis) HCRWS is complete.
- Sustainability of Resources – ***Ongoing***
  - Water meter planning and water use messaging to the public
  - Recycling creativity
  - ROW smart landscaping and attractive streetscapes
    - Discussion Notes: (Francis) Current recycling ideas are in need of funding. Working with Parks & Rec and Public Works on city-wide suggestions.

Consideration and Discussion: Citywide Aspirations & Development of 2025-26 City Priorities

- **Review and Refine Aspiration Rankings** (Presented by Council President Burtenshaw)
  - The City Council members were asked to rank aspirations that were previously put forth as part of the City's Strategic Plan. This process resulted in 2-4 aspirations in each category showing as more important to the members (aggregate ranking).

Budget Assumptions

- Mayor Casper presented a slideshow regarding how budgeting is simplified when the "ground rules" (AKA Budget Assumptions) are established ahead of time.

- A roundtable discussion ensued wherein certain assumptions/expectations were listed for the upcoming budget planning process. Included were talks of priorities, growth and annexation, and the City's Strategic Plan. It was decided that some topics should be discussed early on, such as wages, collective bargaining, and cost allocation. The group agreed that quarterly financials and departmental focus reports have been very helpful throughout the year.

Budget Calendar

- Margaret Wimborne handed out the FY 2025/26 Budget Calendar, which included important dates going through August 2025 and showed who should be in attendance.

Community Survey Update

- Margaret Wimborne provided an update on the community survey that is currently taking place.
    - The survey will close the end of February, with a report back from the company in late March. Final information should be ready to present to City Council at the end of April.
    - The group discussed whether or not the survey should be done again in the future, how often, and what time of year. It was recommended that the cost be considered as well as the data produced.

The meeting adjourned at 1:26pm.

_____ _____

Emily Geisler, City Clerk Rebecca L. Noah Casper, Mayor

Memorandum

File #: 25-218 **City Council Meeting**

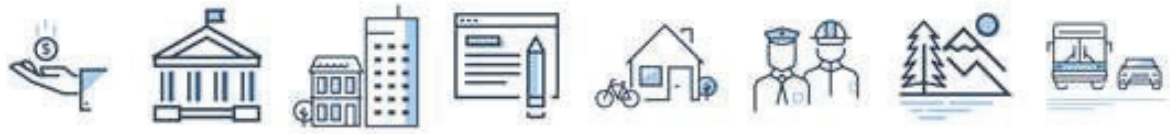
FROM: PJ Holm, Director, Parks and Recreation Dept.
DATE: Thursday, April 3, 2025
DEPARTMENT: Parks & Recreation

Subject
Playground equipment at Willowbrook and Antares parks.

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Accept the proposal from Big T Recreation for purchase and installation of playground equipment at Willowbrook and Antares parks for $99,165 (or take other action deemed appropriate).

Description, Background Information & Purpose
The Parks and Recreation Department issued an RFP for new playground equipment for Willowbrook Park and Antares Park. Three proposals were received, with Big T Recreation being the most responsive to the criteria set forth in the RFP. Big T Recreation will build and install playground equipment at Willowbrook and Antares parks for $99,165.

Alignment with City & Department Planning Objectives



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This purchase of playground equipment supports the Community-Oriented Results of Well-Planned Growth and Development and a Livable Community by developing park enhancements that provide affordable and accessible activities.

Interdepartmental Coordination
Finance worked with Parks Division staff to develop an RFP that included adding addendums and collecting bids.

Fiscal Impact
The $99,165 for this project has been budgeted out of Parks cost code 001-2703-521-5904.

Legal Review
N/A

QUOTE

Big T Recreation
11618 S. State St #1602
Draper, UT 84020
801-572-0782
taft@bigtrec.com

Date	Quote #
03/04/2025	19675
	Exp. Date
	03/31/2025

Shipping Address
City of Idaho Falls 308 Constitution Way Idaho Falls, ID 83402

PRODUCT	DESCRIPTION	QTY	RATE	AMOUNT
	Willowbrook Park - Option 1 City of Idaho Falls			
Playground Structure	Playworld Systems Playground Structure with Discounts Applied Freight Included	1	32,904.00	32,904.00
Installation	Installation of Playground	1	9,609.00	9,609.00
Surfacing	New Wood Chips Surfacing To fill existing pit with 12" Material, Freight and Install Included	1	7,250.00	7,250.00
	Available for purchase on Sourcewell Contract Does not include Demo of existing playground, Removal of existing surfacing, excavation, and site prep.			

SUBTOTAL	
TAX	
TOTAL	$49,763.00

Accepted By

Accepted Date

Acceptance of this quote agrees to the terms and conditions set by Big T Recreation. Please contact us with any questions or concerns P: 801.572.0782, F: 801.216.3077 or E: taft @bigTrec.com or merit@bigTrec.com.

We thank you for your business.

Willowbrook Park – Final Layout
Idaho Falls

PLAYWORLD
The world needs play.

BIG T RECREATION

Willowbrook Park – Final Layout
Idaho Falls

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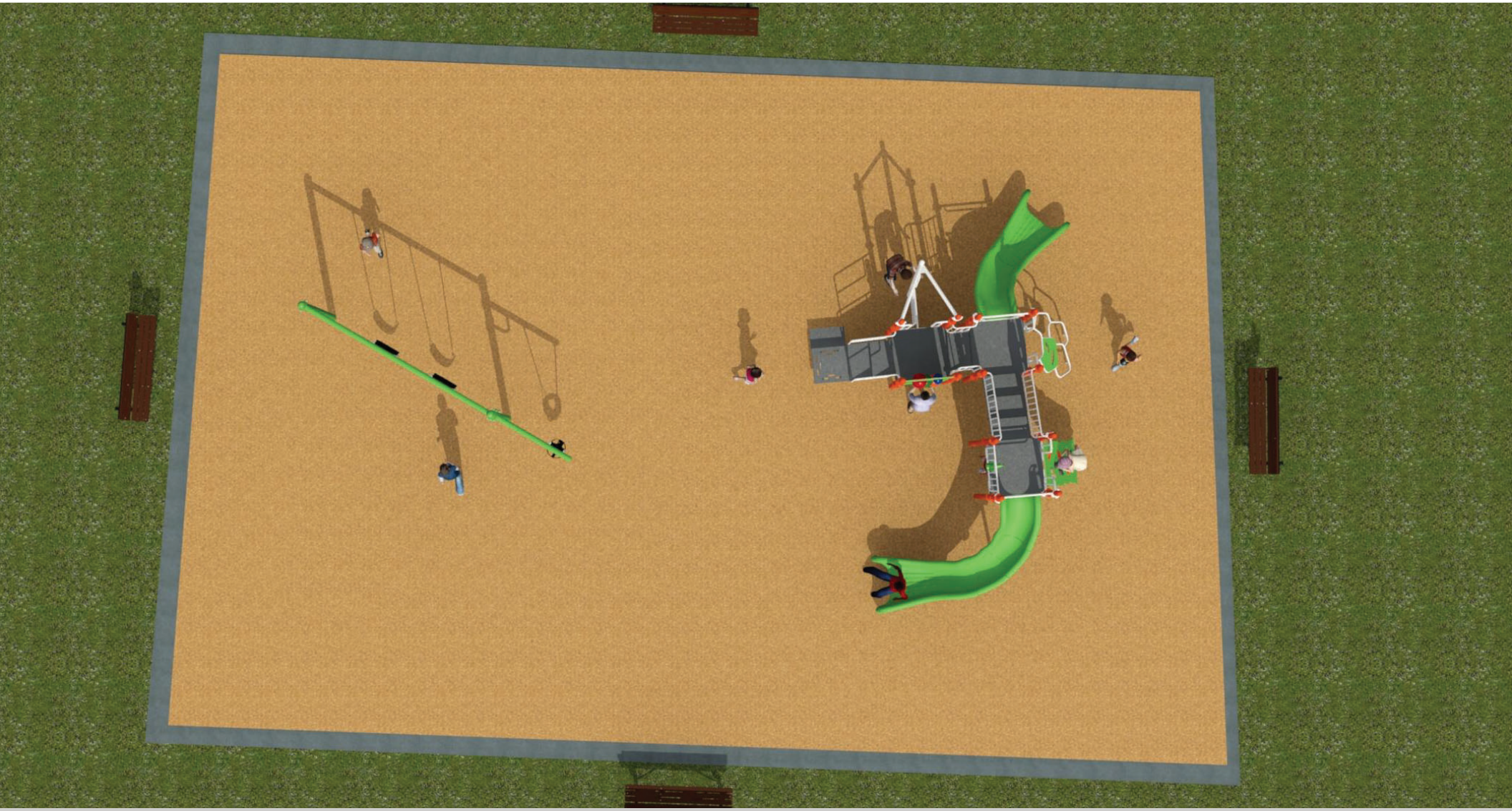

Willowbrook Park – Final Layout
Idaho Falls

PLAYWORLD
The world needs play.

BIG T RECREATION

QUOTE

Big T Recreation
11618 S. State St #1602
Draper, UT 84020
801-572-0782
taft@bigtrec.com

Date	Quote #
03/04/2025	19674
	Exp. Date
	03/31/2025

Shipping Address
City of Idaho Falls 308 Constitution Way Idaho Falls, ID 83402

PRODUCT	DESCRIPTION	QTY	RATE	AMOUNT
	Anatares Park - Option 2 City of Idaho Falls			
Playground Structure	Playworld Systems Playground Structure with Discounts Applied Freight Included	1	34,183.00	34,183.00
Installation	Installation of Playground	1	10,219.00	10,219.00
Surfacing	New Wood Chips Surfacing To fill existing pit with 12" Material, Freight and Install Included	1	5,000.00	5,000.00
	Available for purchase on Sourcewell Contract Does not include Demo of existing playground, Removal of existing surfacing, excavation, and site prep.			

SUBTOTAL	
TAX	
TOTAL	$49,402.00

Accepted By

Accepted Date

Acceptance of this quote agrees to the terms and conditions set by Big T Recreation. Please contact us with any questions or concerns P: 801.572.0782, F: 801.216.3077 or E: taft @bigTrec.com or merit@bigTrec.com.

We thank you for your business.

Antares Park – Final Layout
Idaho Falls

PLAYWORLD
The world needs play.

BIG T RECREATION

Antares Park – Final Layout
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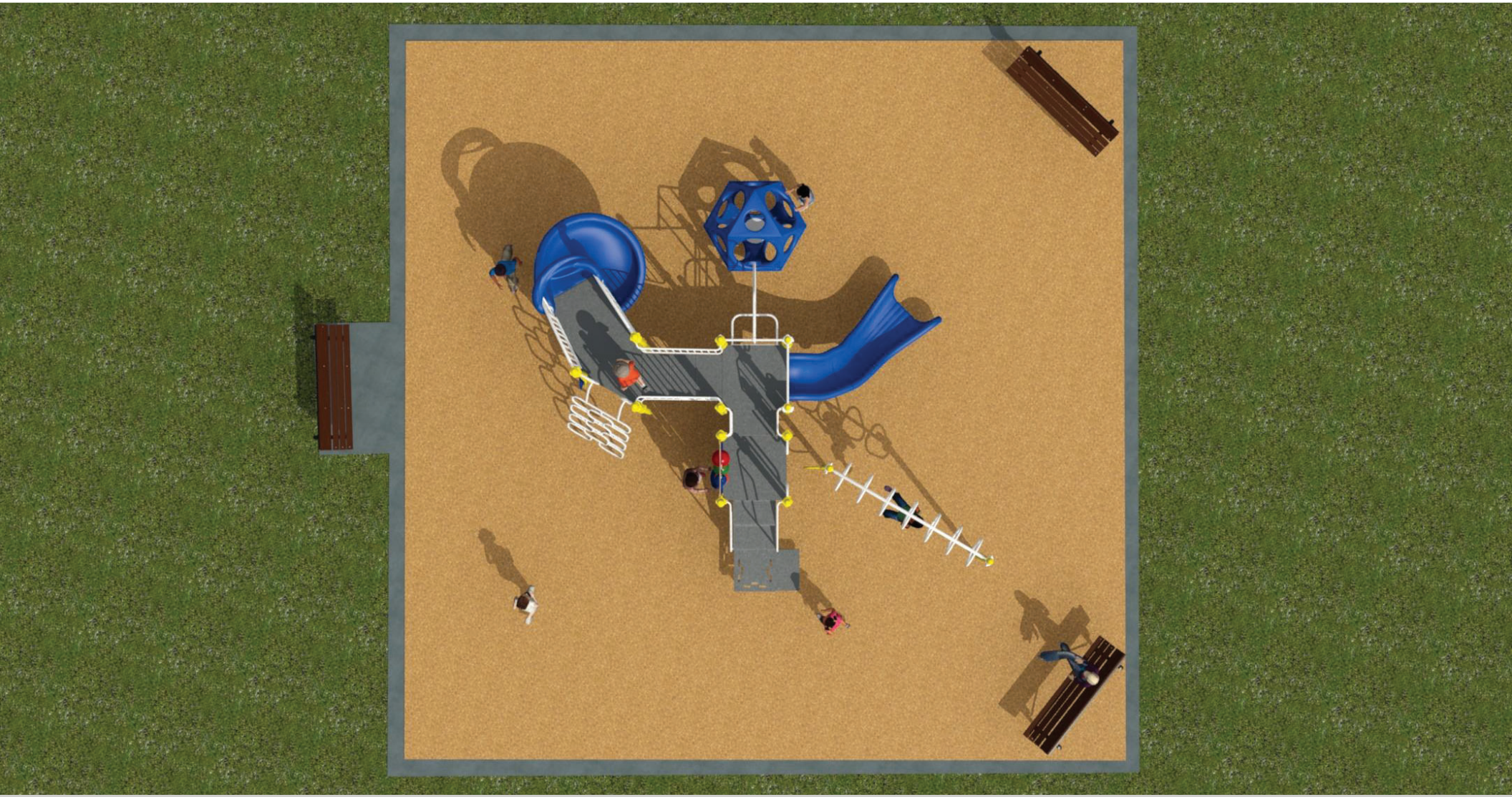


Antares Park – Final Layout
Idaho Falls

PLAYWORLD
The world needs play.

BIG T RECREATION

Memorandum

File #: 25-222 **City Council Meeting**

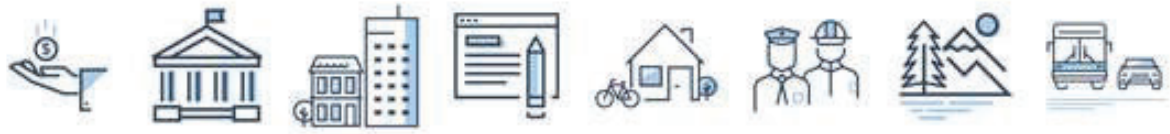
FROM: PJ Holm, Parks and Recreation Director
DATE: Saturday, April 5, 2025
DEPARTMENT: Parks & Recreation

Subject
2025 Idaho Falls Zoo Proposed Fee Increases

Council Action Desired
☐ Ordinance ☐ Resolution ☒ Public Hearing
☐ Other Action (Approval, Authorization, Ratification, etc.)
Conduct a public hearing for the revised Parks and Recreation Zoo fees as listed on the 2025 fee schedule and approve the new and revised fees (or take other action deemed appropriate).

Description, Background Information & Purpose
Notice of the April 10 public hearing to be held at 7:30 p.m. in the City Council Chambers of the City Annex Building located at 680 Park Avenue, Idaho Falls, Idaho, for the Parks and Recreation Zoo proposed fee increases was published in the Post Register twice on March 22 and March 29 of this year, 2025. The proposed Parks and Recreation fees have an April 24, 2025, effective date.

Alignment with City & Department Planning Objectives



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The adoption of the fees is in support of the good governance community-oriented result by fostering innovative and sound fiscal management that enables trust and transparency.

Interdepartmental Coordination
The Parks and Recreation Department has collaborated with the City's Legal Department and other staff in the development of these revised fees.

Fiscal Impact
The revenue collected from these fees, if adopted, will be applied to the department's budget and serve to offset the cost of providing Zoo services.

Legal Review

The Legal Department concurs that the desired Council action is compliant with Idaho Code.

CITY OF IDAHO FALLS – Fee Changes

NOTICE IS HEREBY GIVEN that the City of Idaho Falls proposes to impose the following new fee increases greater than 5% of such fees collected. The additional fees are necessary to cover services provided by City of Idaho Falls or for increased costs to service currently provided. Public comment on these proposed changes will be received at a public hearing on April 10, 2025, at City of Idaho Falls Council Chambers, in the City Annex Building, located at 680 Park Avenue, Idaho Falls, Idaho, at 7:30pm.

Department / Division / Item Description	Effective October 1, 2024 Fee	Effective April 24, 2025 Proposed Fee	Unit of measurement
PARKS & RECREATION			
Idaho Falls Zoo at Tautphaus Park			
Adult Admission			
Resident	$7.00	$9.00	per visit
Non-Resident	$10.00	$12.00	per visit
Child Admission			
Resident	$6.00	$6.00	per visit
Non-Resident	$8.00	$9.00	per visit
Senior Admission			
Resident	$6.50	$6.50	per visit
Non-Resident	$8.00	$10.50	per visit

Memorandum

File #: 25-203 **City Council Meeting**

FROM: Ian Turner, Airport Director
DATE: Thursday, April 10, 2025
DEPARTMENT: Airport

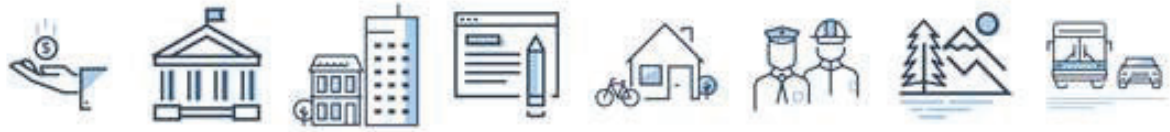
Subject
Consideration of Resolution Approving 2025 Idaho Falls Regional Airport Master Plan

Council Action Desired
☐ Ordinance ☒ Resolution ☐ Public Hearing

☐ Other Action (Approval, Authorization, Ratification, etc.)

Approve the resolution adopting the 2025 Idaho Falls Regional Airport Master Plan (or take other action deemed appropriate).**Description, Background Information & Purpose**
The 2025 Idaho Falls Regional Airport Master Plan process began in July 2021. Since then, the Airport and its consultant applied a forecast of aviation demand to the existing conditions at the airport to produce this twenty-year plan. The process included four technical advisory committee meetings, four public meetings, a public comment period, numerous discussions with airport staff, and multiple presentations to City Council. The final product of the airport master plan and airport layout plan are included with this item. It has been reviewed by the Federal Aviation Administration and is now ready for formal adoption to guide the future development of the Airport.

Alignment with City & Department Planning Objectives



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This item supports the community-oriented results of strong, stable, and healthy economic growth and vibrancy; good governance; managed, well-planned growth and development; and reliable public infrastructure, transportation and mobility.

Interdepartmental Coordination
The airport has coordinated with numerous departments throughout the development of the airport master plan.

Fiscal Impact
While the airport master plan contains estimates on future capital improvements, no funding commitments are made by approving this item.

Legal Review

The Legal Department concurs that the action item complies with Idaho State Statute.

RESOLUTION NO. 2025-___

A RESOLUTION OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO, ADOPTING THE 2025 AIRPORT MASTER PLAN FOR THE IDAHO FALLS REGIONAL AIRPORT.

WHEREAS, the City of Idaho Falls, through its Airport Department, recognized the need to update the Idaho Falls Regional Airport Master Plan; and,

WHEREAS, the plan was initiated in accordance with the guidance of the Federal Aviation Administration in July of 2021; and,

WHEREAS, the plan was entirely funded by a Federal Aviation Administration Airport Improvement Program Grant, No. 3-16-0018-050-2021, and,

WHEREAS, public engagement was sought and received from airport users, airport tenants, members of the public, and subject matter experts; and,

WHEREAS, the 2025 Idaho Falls Regional Airport Master Plan has been reviewed by the Federal Aviation Administration and all required input has been included in the plan; and,

WHEREAS, the Mayor and City Council of Idaho Falls has received routine briefings and updates on the progress of the 2025 Idaho Falls Regional Airport Master Plan.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND THE CITY COUNCIL OF THE CITY OF IDAHO FALLS, AS FOLLOWS:

1. The 2025 Idaho Falls Regional Airport Master Plan is, hereby, approved and adopted.

2. The Airport Layout Plan, contained within the 2025 Idaho Falls Regional Airport Master Plan, is approved. The Airport Director is directed to sign the necessary documents and forms to complete the Airport Layout Plan and submit the Airport Layout Plan to the Federal Aviation Administration.

3. In accordance with the requirements of the Federal Aviation Administration, the Airport Director is hereby directed to keep the Airport Layout Plan current. The Airport Director is hereby authorized to sign all necessary documents and forms for periodic adjustments to the Airport Layout Plan required to keep the Airport Layout Plan current. Such periodic layout adjustments may include, but not limited to, changes required to accommodate increased passenger traffic, new aircraft types, facility upgrades or expansions, safety concerns, airport design standards, or aircraft traffic optimization.

ADOPTED and effective this 10th day of April, 2025.

ATTEST:

CITY OF IDAHO FALLS, IDAHO:

_____

Emily Geisler, City Clerk

_____

Rebecca L. Noah Casper, Phd., Mayor

Memorandum

File #: 25-210 **City Council Meeting**

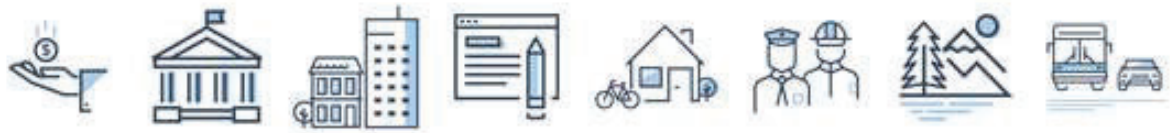
FROM: Duane A Nelson, Fire Chief
DATE: Friday, March 28, 2025
DEPARTMENT: Fire Department

Subject
International Fire Code Ordinance

Council Action Desired
☒ Ordinance ☐ Resolution ☐ Public Hearing
☐ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Ordinance amending sections 7-10-1 through 7-10-5 adopting the International Fire Code under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title or reject the Ordinance.)

Description, Background Information & Purpose
Adoption of the most current edition of the International Fire Code ensures application of the most current guidelines and aligns the current code with Community Development Services and the State of Idaho.

Alignment with City & Department Planning Objectives



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This supports the City's Community-oriented results by maintaining a mix of regulations and practices that provide the regulatory framework for supporting a high-quality community.

Interdepartmental Coordination
Legal

Fiscal Impact
N/A

Legal Review
The Legal Department prepared the proposed ordinance. The Council is authorized by Idaho Code § 39-4116 to adopt the ordinance.

ORDINANCE NO. _____

AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; PROVIDING FOR THE AMENDMENT OF TITLE 7, CHAPTER 10 OF THE IDAHO FALLS CITY CODE TO PROVIDE FOR THE ADOPTION OF THE INTERNATIONAL FIRE CODE, 2018 EDITION PROVIDING SEVERABILITY, CODIFICATION, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE.

WHEREAS, the City wishes to adopt the most current edition of the International Fire Code to ensure application of the most current guidelines therein.

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, THAT:

SECTION 1. Title 7, Chapter 10, Sections 1 of the City Code of the City of Idaho Falls, Idaho, is hereby amended as follows:

7-10-1: INTERNATIONAL FIRE CODE ADOPTED

(A) Fire Code Adopted: The International Fire Code, ~~2015~~ 2018 Edition, as published by the International Code Council, Inc., including all Appendices, are hereby adopted as an official fire code of the City, save and except such portions as are hereinafter deleted, modified or amended by the provisions of this Chapter.

(B) Code on File: One (1) copy of the International Fire Code, ~~2015~~ 2018 Edition, duly certified by the Clerk shall be retained by the City Clerk for use and examination by the public.

(C) Any reference in the City Code to the International Fire Code shall refer to the most recent version of the International Fire Code adopted by the City, as provided for in this Chapter.

SECTION 2. Title 7, Chapter 10, Section 3 of the City Code of the City of Idaho Falls, Idaho, is hereby rescinded in its entirety and replaced with the following language:

7-10-3: AMENDMENTS AND ADDITIONS TO THE INTERNATIONAL FIRE CODE:

(A) Subsection of 105.1.1 Permits required shall be adopted as follows:

105.1.1 A property owner or owner's authorized agent who intends to conduct an operation or business, or is currently conducting or operating a business, or install or modify systems and equipment that are regulated by this Code, or to cause any such work to be performed, shall first make application to the Fire Code Official and obtain the

required permit. Businesses regulated by this Code shall also register their business with the Clerk.

(B) Subsection of 105.1.2 Types of permits shall be adopted as follows:

Permit Fees:

105.1.2.1 Each operational permit fee shall be in an amount set from time to time by Resolution of the Council;

105.1.2.2 Each construction permit fee shall be in an amount set from time to time by Resolution of the Council;

105.1.3 Where multiple permits are required for the same location, the Fire Code Official may authorize to consolidate such permits into one permit.

(C) Subsection 105.7.1 Automatic fire-extinguishing systems shall be amended to read as follows:

A construction permit and Life Safety License is required for the installation of or modification to an Automatic fire extinguishing system. Maintenance performed in accordance with this code is not considered a modification and does not require a permit.

1. Contractors performing maintenance on automatic fire- extinguishing systems shall obtain a Life Safety License prior to commencing work and shall provide a copy of the maintenance report to the Fire Code Official at the completion of the work performed.

2. The Fire Code Official is authorized to not require a plan review fee for modifications to automatic fire-extinguishing systems where ten (10) or fewer sprinkler heads are affected in the scope of work. A Life Safety License and permit are required to be submitted to the Fire Code Official for review prior to the start of the project and a record of completion shall be permitted to the Fire Code Official at the completion of the project.

(D) Subsection 105.7.6 Emergency Responder Radio Coverage System shall be amended to read as follows:

A construction permit and Life Safety License is required for installation of or modification to an Emergency Responder Radio Coverage System. Maintenance performed in accordance with this code is not considered a modification and does not require a permit.

1. Contractors performing maintenance on an Emergency Responder Radio Coverage System shall obtain a Life Safety License prior to commencing work and shall provide a copy of the maintenance report to the Fire Code Official at the completion

of the work performed.

(E) Subsection 105.7.7 Fire alarm and detection systems and related equipment shall be amended to read as follows:

A construction permit and Life Safety License is required for installation of or modification to Fire alarm and detection systems and related equipment. Maintenance performed in accordance with this code is not considered a modification and does not require a permit.

1. Contractors performing maintenance on Fire alarm and detection systems and related equipment shall obtain a Life Safety License prior to commencing work and shall provide a copy of the maintenance report to the Fire Code Official at the completion of the work performed.

(F) Subsection 105.7.8 Fire pumps and related equipment shall be amended to read as follows:

A construction permit and Life Safety License is required for installation of or modification to fire pumps and related fuel tanks, jockey pumps, controllers, and generators. Maintenance performed in accordance with this code is not considered a modification and does not require a permit.

1. Contractors performing maintenance on fire pumps and related equipment shall obtain a Life Safety License prior to commencing work and shall provide a copy of the maintenance report to the Fire Code Official at the completion of the work performed.

(G) Subsection 106.3 Failure to obtain any require fire code permit, prior to engaging in activities, operations, practices or functions, as set forth in the International Fire Code, shall constitute a violation of the code. The activity, operation, or practice will be issued a stop work order until a permit has been obtained and a double permit fee collected.

(H) Subsection 106.6 Life Safety License required shall be adopted as follows: Any person or entity shall obtain a Life Safety License from the Fire Code Official prior to performing any installation, modification, inspection, testing, or maintenance on a Life Safety System in the City of Idaho Falls. Life Safety Licenses shall be valid for the calendar year issued. The fee for a Life Safety License shall be in an amount set from time to time by Resolution of the Council. All Life Safety Licenses shall be non-transferrable.

(I) Subsection 106.7 Penalties for violation of license requirement shall be adopted as follows: Any person or entity who violates any rules or regulations as written on the license application, shall be guilty of a misdemeanor and upon conviction shall be punished by a fine of not more than three-hundred dollars ($300). Each twenty-four (24)

hour period that a violation continues after due notice has been served shall be deemed a separate offense.

(J) Subsection 106.8 Payment of permits, licenses and fees shall be adopted as follows: All costs, fees, and payments associated with any permit or license provided for in the Fire Code shall be paid to the City of Idaho Falls City Treasurer's Office or as otherwise specified by the Fire Department.

(K) Subsection 106.9 Fees shall be adopted as follows:

106.9.1 Structural plan review fees. Structural plan review fees will be charged at a rate in an amount set from time to time by Resolution of the Council. Upon request from the Fire Code Official, the City reserves the right to charge additional structural plan review fees for large or complex structural plan submissions.

106.9.2 Fire alarm plan review fees. Fire alarm plan review fees will be charged at a rate in an amount set from time to time by Resolution of the Council. This fee includes plan review and one (1) acceptance test field inspection by fire prevention personnel. An additional fee, in an amount set from time to time by Resolution of Council, will be charged for inspection of fire alarm systems exceeding this amount.

106.9.3 Fire sprinkler system plan review fees. Fire sprinkler system fees will be charged at a rate in an amount set from time to time by Resolution of the Council. This fee includes plan review, and one (1) acceptance field inspection. Field inspections are to include fire service underground, rough-in inspection, hydro-test with all heads in place, and final acceptance test of system. An additional fee, in an amount set from time to time by Resolution of Council, will be charged for inspection of fire sprinkler systems exceeding this amount.

106.9.4 Fire pump review fees. Fire pump fees will be in an amount set from time to time by Resolution of the Council. This fee includes plan review and acceptance testing of the fire pump.

106.9.5 Alarm response fee. The Fire Code Official is authorized to charge a maximum fee in an amount set from time to time by Resolution of the Council per occurrence for fire apparatus response to Life Safety System activation where the service contractor fails to contact the Fire Code Official and/or Fire Dispatch Center when servicing such systems or excessive responses to the same location. The fee does not apply to a false alarm which is defined as the willful and knowing initiation or transmission of a signal, message or other notification of an even of fire when no such danger exists. The fee, subject to review by the Fire Code Official will apply to nuisance alarms exceeding four (4) responses to the same location within a thirty (30) day period. Nuisance alarms are defined as any alarm caused by mechanical failure, malfunction, improper installation, or lack of proper maintenance, or any alarm activated by a cause that cannot be determined. The fee will be charged to the business owner and/or service contractor after review by the Fire Code Official.

(L) Subsection 110.4 Violation penalties shall be amended to read as follows: Persons or entities who violate a provision of this code or shall fail to comply with any of the requirements thereof or who shall erect, install, alter, repair or do work in violation of the approved construction documents or directive of the Fire Code Official, or of a permit or certificate used under the provisions of this code, as amended, shall be guilty of a misdemeanor. Each twenty-four (24) hour period that a violation continues after due notice has been served shall be deemed a separate offense.

(M) Subsection 112.4 Failure to comply shall be amended to read as follows: Any person who shall continue any work after having been served with a stop work order, except such work as that person is directed to perform to remove a violation or unsafe condition, shall be liable to pay a fine in an amount set from time to time by Resolution of the Council.

(N) Subsection 503.2.1 Dimensions shall be amended to read as follows:

Fire apparatus access roads shall have an unobstructed width of not less than twenty-six feet (26'), exclusive of shoulders, except for approved security gates in accordance with Section 503.6, and an unobstructed vertical clearance of not less than 13 feet 6 inches.

(O) Subsection 503.2.4 Turning Radius shall be amended to read as follows:

The required turning radius of a fire apparatus access road shall be a thirty foot (30') turning radius.

(P) Subsection 504.1 Required Access shall be amended to read as follows:

Exterior doors and openings required by this code, or the International Building Code shall be maintained readily accessible for emergency access by the Fire Department. An approved access walkway leading from fire apparatus aces road to exterior opening shall be provide within seventy-five feet (75'). This access walkway shall be constructed six feet (6') wide minimum, standard six inch (6") curb elevated from road surface and access ramp transition meeting ADA standards where required by the fire code official.

(Q) Subsection 901.4 Installation shall be amended to read as follows:

Fire protection systems shall be maintained in accordance with the original installation standards for that system. Fire detection and alarm systems, emergency alarm systems, gas detection systems, fire extinguishing systems, fire hydrant systems, fire standpipe systems, fire pump systems, private fire service mains systems, and all other fire protection systems, and appurtenances there to shall be limited to one (1) structure and property lot unless approved by the fire code official. Required systems shall be extended, altered, or augmented as necessary to maintain and continue protection where the building is altered, remodeled, or added to. Alternations to the fire protection systems shall be done in accordance with applicable standards.

(S~~N~~) Subsection 5604 Prohibited storage shall be adopted to read as follows:

The storage of explosives and blasting agents is prohibited within the Corporate Limits of the City of Idaho Falls.

Exception: The Fire Code Official may issue a permit, pursuant to Section 105, to allow the use of explosives and blasting agents within the Corporate Limits of the City of Idaho Falls. Such permit shall prescribe conditions and restrictions for the use of explosives and blasting agents, consistent with this chapter.

(T~~O~~) Subsection 5704.2.9.6.1 Locations where above-ground tanks are prohibited shall be amended to read as follows:

The storage of Class I and Class II liquids in above-ground tanks outside of buildings is prohibited within the Corporate Limits of the City of Idaho Falls. Exceptions:

1. The Fire Code Official, with approval of the Fire Chief, may allow protected above-ground tanks at motor vehicle fuel dispensing stations. Protected above-ground tanks may be allowed where underground rock formations or water levels make it extremely difficult or impossible to install underground tanks or underground install is cost prohibitive for limited use fuel dispensing stations. Such tanks shall meet the UL 2085 listing and comply with Sections 2306.2, 3104.17.2, 5704.2.7.3.5, 5704.2.9, and 5704.2.13.2. Each approved tank shall not exceed twelve thousand (12,000) gallons in individual capacity and no more than fortyeight thousand (48,000) gallons in aggregate capacity may be stored in this manner on any one property within the City.

2. The Fire Code Official, with approval of the Fire Chief, may allow the use of temporary above-ground storage tanks at construction sites, earth moving projects or gravel pits. Such tanks shall comply with Sections 3104.17.2, 5704.2.9, and Section 5706 in its entirety.

   2.1 The storage of flammable or combustible liquids in above-ground tanks, and the dispensing of combustible liquids into vehicles from above-ground tanks, shall not be permitted in the following zones as defined by the City Zoning Ordinance and located within the current Official Zoning Map: RP, RP-A, R-1, R-2, R-2A, R-3, R-3A, P-B, and RMH.

(U~~P~~) Subsection 5706 Locations where above-ground tanks are prohibited shall be amended to read as follows:

The limits in which new bulk plants in accordance with Section 5706, where flammable or combustible liquids are received by tank vessels, pipelines, tank cars, or tank vehicles, and are stored in blended in bulk for the purpose of distributing such liquids by tank

vessels, pipelines, tank cars, tank vehicles, or containers are prohibited within the Corporate Limits of the City of Idaho Falls.

(V~~Q~~) Section 5806.2 Limitations shall be amended to read as follows:

Storage of flammable cryogenic fluids in stationary containers outside of buildings is prohibited within the Corporate Limits of the City of Idaho Falls.

(W~~R~~) Section 6104.2 Restricted zones shall be adopted as follows:

Storage of liquefied petroleum gas is restricted within all zones in the City, as defined by the City Zoning Ordinance and located within the current City's Official Zoning Map. Exception: Storage of liquefied petroleum gas is permitted, consistent with this chapter, within the Industrial and Manufacturing Zones I&M-1 and I&M-2, as defined by the City Zoning Ordinance and located within the current City's Official Zoning Map.

(X) Section D105.1 Where Required shall be amended to read as follows:

Where the vertical distance between the grade plan and the highest roof surface exceeds thirty feet (30') or the building exceeds two (2) stories in height, approved aerial fire apparatus roads shall be provided. For the purposes of this section, the highest roof surface shall be determined by measurement to the eave of a pitched roof, the intersection of the roof to the exterior wall, or the top of parapet walls, whichever is greater.

SECTION 3. Savings and Severability Clause. The provisions and parts of this Ordinance are intended to be severable. If any section, sentence, clause, or phrase of this Ordinance should be held to be invalid or unconstitutional by a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause, or phrase of this Ordinance.

SECTION 4. Codification Clause. The City Clerk is instructed to immediately forward this Ordinance to the codifier of the official municipal code for proper revision of the Code.

SECTION 5. Publication and Effective Date. This Ordinance, or a summary thereof in compliance with Idaho Code, shall be published once in the official newspaper of the City, and shall take effect immediately upon its passage, approval, and publication.

[Intentionally Blank – Signature Page to Follow]

PASSED by the City Council and APPROVED by the Mayor of the City of Idaho Falls, Idaho, this _____ day of _____, 2025.

ATTEST:

CITY OF IDAHO FALLS, IDAHO

_____

EMILY GEISLER, CITY CLERK

_____

REBECCA L. NOAH CASPER, Ph.D., MAYOR

STATE OF IDAHO)
) ss:
County of Bonneville)

I, EMILY GEISLER, CITY CLERK OF THE CITY OF IDAHO FALLS, IDAHO, DO HEREBY CERTIFY:

That the above and foregoing is a full, true and correct copy of the Ordinance entitled, "AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; PROVIDING FOR THE AMENDMENT OF TITLE 7, CHAPTER 10 OF THE IDAHO FALLS CITY CODE TO PROVIDE FOR THE ADOPTION OF THE INTERNATIONAL FIRE CODE, 2018 EDITION PROVIDING SEVERABILITY, CODIFICATION, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE."

_____
EMILY GEISLER, CITY CLERK

(SEAL)

Memorandum

File #: 25-219 **City Council Meeting**

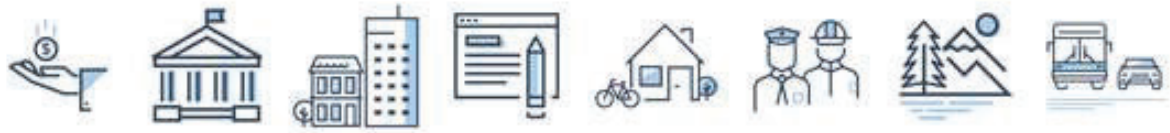
FROM: Chief Bryce Johnson
DATE: Friday, April 4, 2025
DEPARTMENT: Police Department

Subject
Graffiti Ordinance Update

Council Action Desired
☒ Ordinance ☐ Resolution ☐ Public Hearing
☐ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Ordinance updating City Code Title 5, Chapter 10, Section 6, under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and request that it be read by title, reject the Ordinance, or take other action deemed appropriate).

Description, Background Information & Purpose
The Council recently approved updates to the City's graffiti ordinance, eliminating the language that City staff enter private property to clean private property. During that update, one reference to that language was missed in the "Exceptions to removal" section. That section will now be updated allowing an exception to the removal of graffiti if the removal would cause irreparable harm to the property. This update makes it clear the private property owner is removing the graffiti but has an exemption if the removal will cause irreparable harm to the property.

Alignment with City & Department Planning Objectives



☒ ☐ ☐ ☐ ☐ ☒ ☐ ☐

The requested updates are consistent with the Safe and Secure Community-oriented result.

Interdepartmental Coordination
This update has been coordinated with the City Attorney's Office as well as City Departments which are responsible for City property and might therefore need to remove graffiti from City property.

Fiscal Impact
There is no fiscal impact associated with making this change.

Legal Review
The proposed language was drafted by the City Attorney's Office.

ORDINANCE NO. _____

AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; AMENDING TITLE 5, CHAPTER 10, SECTION 6 OF THE IDAHO FALLS CITY CODE, _____, PROVIDING SEVERABILITY, CODIFICATION, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE.

WHEREAS, the City of Idaho Falls is authorized under the Idaho Constitution and Idaho Code § 50-302 to adopt ordinances to maintain the peace and welfare and establish penalties and fines for the violation thereof; and

WHEREAS, Council finds that graffiti is a blight to the aesthetics of the community, which constitutes a public nuisance; and

WHEREAS, Council finds that property owners are responsible to maintain private property, including the abatement of graffiti that may occur upon private property.

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, THAT:

SECTION 1: Title 5, Chapter 10, Section 6 of the City Code of the City of Idaho Falls, Idaho, is hereby amended as follows:

5-10-6: EXCEPTIONS TO REMOVAL.

The removal requirements in this Chapter shall not apply if the property owner(s), occupant(s), or person(s) in control of the property or their representative can demonstrate by a preponderance of the evidence that:

(A) If the ~~City removes~~removal of the graffiti~~, it~~ will cause irreparable harm to property; or
(B) The the alleged markings are not "graffiti", as that term is defined in this Chapter.

SECTION 2. Savings and Severability Clause. The provisions and parts of this Ordinance are intended to be severable. If any section, sentence, clause, or phrase of this Ordinance should be held to be invalid or unconstitutional by a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause, or phrase of this Ordinance.

SECTION 3. Codification Clause. The Clerk is instructed to immediately forward this Ordinance to the codifier of the official municipal code for proper revision of the Code.

SECTION 4. Publication and Effective Date. This Ordinance, or a summary thereof in

compliance with Idaho Code, shall be published once in the official newspaper of the City, and shall take effect immediately upon its passage, approval, and publication.

PASSED by the City Council and APPROVED by the Mayor of the City of Idaho Falls, Idaho, this _____ day of _____, 2025.

ATTEST: CITY OF IDAHO FALLS, IDAHO

_____ _____

EMILY GEISLER, CITY CLERK REBECCA L. NOAH CASPER, Ph.D., MAYOR

(SEAL)

STATE OF IDAHO)
) ss:
County of Bonneville)

I, EMILY GEISLER, CITY CLERK OF THE CITY OF IDAHO FALLS, IDAHO, DO HEREBY CERTIFY:

That the above and foregoing is a full, true and correct copy of the Ordinance entitled, "AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; AMENDING TITLE 5, CHAPTER 10, SECTION 6 OF THE IDAHO FALLS CITY CODE, _____, PROVIDING SEVERABILITY, CODIFICATION, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE."

_____
EMILY GEISLER, CITY CLERK

(SEAL)

Memorandum

File #: 25-215 **City Council Meeting**

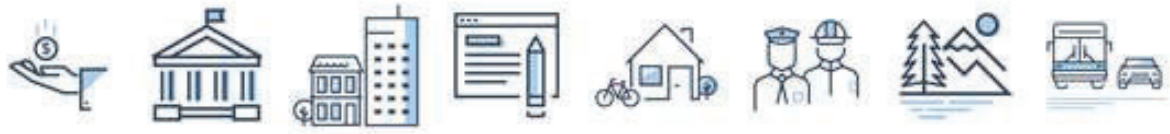
FROM: Chris H Fredericksen, Public Works Director
DATE: Wednesday, April 2, 2025
DEPARTMENT: Public Works

Subject
Bid Award - Water Meter Box Installation 2025 Phase II

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the plans and specifications; award to the lowest responsive, responsible bidder, JM Concrete, Inc., in the amount of $1,151,410.00; and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
On Wednesday, March 19, 2025, bids were received and opened for the Water Meter Box Installation 2025 Phase II project. The tabulation of bid results is attached. The purpose of the project is to install water meter pits within the northwest section of Idaho Falls.

Alignment with City & Department Planning Objectives



☐ ☐ ☐ ☐ ☐ ☐ ☒ ☒

This project supports the community-oriented results of environmental sustainability and reliable public infrastructure by investing in the placement of water meter pits.

Interdepartmental Coordination
Project reviews have been conducted with all necessary city departments to ensure coordination of project activities.

Fiscal Impact
Cost allocation for this project was budgeted from the Water Fund and sufficient budget authority exists for completion of the proposed activities.

Legal Review
The Legal Department reviewed the bid process and concurred that the Council action complies with the requirements of Idaho Code § 67-2805.

0-00-00-0-WTR-2024-23
2025-018

WATER METER BOX INSTALLATION 2025 PHASE II

PROJECT # 0-00-00-0-WTR-2024-23

PROJECT LOCATION

MAYOR

REBECCA L. NOAH CASPER

CITY COUNCIL

MICHELLE ZIEL-DINGMAN
LISA BURTENSHAW
KIRK LARSEN
JIM FRANCIS
JOHN B. RADFORD
JIM FREEMAN

ENGINEERING DIVISION

PUBLIC WORKS DIRECTOR
CHRIS H FREDERICKSEN, P.E.

CITY ENGINEER
JON KNOWLES, P.E.

2025

PROFESSIONAL ENGINEER REGISTERED 14787 STATE OF IDAHO JONATHAN W. KNOWLES 02/28/2025

AS BUILT DATE / BY: ____ / ____

SCALE SHOWN IS FOR SHEET 11 x 17 ONLY

ENGINEERING DIVISION

IDAHO FALLS PUBLIC WORKS

WATER METER BOX INSTALLATION 2025 PHASE II

CHECKED BY:	DESIGN TECH:	DATE PLOTTED:	SHEET NO.
CW	ME	2/28/2025	1 OF 34

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City of Idaho Falls

Engineering Division

Engineer's Estimate

Project: Water Meter Box Installation 2025 Phase II ***Number:*** 0-0-0-0-WTR-2024-23

Submitted: JON KNOWLES, P.E. ***Date:*** March 19, 2025

Reference Number	Description	Estimated Quantity	Unit	Engineer's Estimate		JM Concrete, Inc		3H Construction LLC	
				Unit Price	Total Amount	Unit Price	Total Amount	Unit Price	Total Amount
	DIVISION 200 - EARTHWORK								
201.4.1.D.1	Removal of Concrete	150	SY	$50.00	$7,500.00	$20.00	$3,000.00	$78.00	$11,700.00
	DIVISION 300 - TRENCHING								
307.4.1.A.1	Miscellaneous Surface Restoration (Landscaping)	1582	LF	$50.00	$79,100.00	$55.00	$87,010.00	$65.00	$102,830.00
	DIVISION 700 - CONCRETE								
706.4.1.E.1.b	Concrete Sidewalks, thickness 5"	150	SY	$200.00	$30,000.00	$100.00	$15,000.00	$320.00	$48,000.00
	SPECIAL PROVISIONS								
S0480A	Meter Box 1"	325	EA	$1,500.00	$487,500.00	$3,200.00	$1,040,000.00	$4,998.00	$1,624,350.00
S0480B	Meter Box 1.5"	1	EA	$2,000.00	$2,000.00	$3,200.00	$3,200.00	$5,285.00	$5,285.00
S0480C	Meter Box 2"	1	EA	$2,500.00	$2,500.00	$3,200.00	$3,200.00	$5,285.00	$5,285.00
	TOTAL				**$608,600.00**		**$1,151,410.00**		**$1,797,450.00**

Memorandum

File #: 25-216 **City Council Meeting**

FROM: Chris H Fredericksen, Public Works Director
DATE: Wednesday, April 2, 2025
DEPARTMENT: Public Works

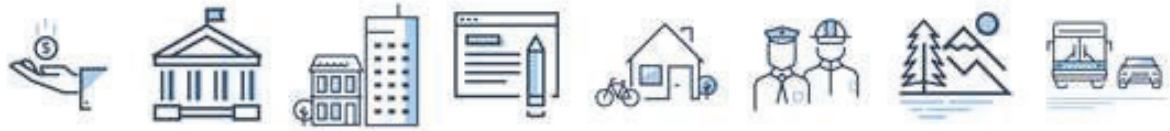
Subject
Negotiated Contract - Elevated Water Supply Line with JM Concrete Incorporated

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the plans, specifications, and negotiated contract with JM Concrete, Inc., in the amount of $470,505.00; and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
On Wednesday, February 19, 2025, a bid opening was scheduled for the Elevated Water Tower Supply Line project. No bids were received. Public Works gained Council approval at the March 20th, 2025, Council Meeting to turn to the open market to secure qualified public works contractor(s) to complete the work.

The negotiated contract to construct a water line from Well 3 to the new elevated tower with JM Concrete is now being brought forward for consideration.

Alignment with City & Department Planning Objectives



☐ ☐ ☐ ☐ ☐ ☐ ☐ ☒

This project supports the community-oriented result of reliable public infrastructure by investing in the city's water system.

Interdepartmental Coordination
Project reviews have been conducted with all necessary city departments to ensure coordination of project activities.

Fiscal Impact
Cost allocation for this project was budgeted from the Water Fund; sufficient budget authority exists for completion of the proposed activities.

Legal Review

The Legal Department reviewed the proposed action and concurs that it is compliant with the requirements of Idaho State Statutes.

2-37-24-1-WTR-2020-35
2025-020

AGREEMENT
Elevated Water Tower Supply Line
PROJECT NO. 2-37-24-1-WTR-2020-35

Recitals

WHEREAS, Owner published and advertised Project No. 2-37-24-1-WTR-20220-35 for public bid; and

WHEREAS, the bid opening date was on February 19, 2025; and

WHEREAS, no bids were received; and

WHEREAS, in accordance with Idaho Code § 67-2805, Owner sought cost proposals on the open market; and

WHEREAS, Contractor submitted an acceptable cost proposal.

THIS AGREEMENT is by and between the City of Idaho Falls ("Owner") and JM Concrete ("Contractor").

Owner and Contractor hereby agree as follows:

ARTICLE 1 – WORK

1.01 Contractor shall complete all Work as specified or indicated in the Contract Documents. The Work is generally described as follows: This project shall consist of the Contractor furnishing all of the tools, labor, equipment, and materials necessary to remove 40 LF of curb & gutter, 30 SY of concrete, and 1 fire hydrant, and install 70 LF of 16" water main pipe, 550 LF of 18" water main pipe, 2 18" water main valves, 1 hydrant, 1 service line, 1 fire service line, 40 LF of curb and gutter, 30 SY of concrete sidewalk, and any additional items specifically defined in the Contract Documents.

ARTICLE 2 – THE PROJECT

2.01 The Project for which the Work under the Contract Documents may be the whole or only a part is generally described as follows: See above 1.01.

ARTICLE 3 – ENGINEER

3.01 The Idaho Falls City Engineer has the rights and authority assigned to

Engineer in the Contract Documents in connection with the completion of the Work in accordance with the Contract Documents.

ARTICLE 4 – CONTRACT TIMES

4.01. Time of the Essence

A. All time limits for Milestones, if any, Substantial Completion, and completion and readiness for final payment as stated in the Contract Documents are of the essence of the Contract. Failure to meet Milestones or other timed performance obligations shall be considered a Material Breach.

4.02. Days to Achieve Milestones, Substantial Completion, and Final Payment

A. The Work will be substantially completed within 75 Days calendar days after the date when the Contract Times commence to run as provided in Paragraph SC-4.01 of the Supplementary Conditions and completed and ready for final payment in accordance with Paragraph 15.06 of the General Conditions within Contract time plus 15 calendar days after the date when Contract Times commence to run.

B. Milestone(s) if any, will be completed by the date(s) defined in the Special Provisions.

4.03. Liquidated Damages

A. Contractor and Owner recognize that time is of the essence as stated in Paragraph 4.01 above and that Owner will suffer financial loss if the Work is not completed within the times specified in Paragraph 4.02 above, plus any extensions thereof allowed in accordance with Article 12 of the General Conditions. The parties also recognize the delays, expense, and difficulties involved in proving in a legal or arbitration proceeding the actual loss suffered by Owner if the Work is not completed on time. Accordingly, instead of requiring any such proof, Owner and Contractor agree that as liquidated damages for delay (but not as a penalty), Contractor shall pay Owner $1,000.00 for each day that expires after the time specified in Paragraph 4.02 above for Substantial Completion until the Work is substantially complete. After Substantial Completion, if Contractor shall neglect, refuse, or fail to complete the remaining Work within the Contract Time or any proper extension thereof granted by Owner, Contractor shall pay Owner $500.00 for each day that expires after the time specified in Paragraph 4.02 above for

completion and readiness for final payment until the Work is completed and ready for final payment.

ARTICLE 5 – CONTRACT PRICE

5.01. Owner shall pay Contractor for completion of the Work in accordance with the Contract Documents an amount in current funds as follows:

A. For all Work (including Unit Price Work), at the prices stated in Contractor's Cost Proposal, attached hereto as an exhibit.

ARTICLE 6 – PAYMENT PROCEDURES

6.01. Submittal and Processing of Payments

A. Contractor shall submit Applications for Payment in accordance with Article 15 of the General Conditions. Applications for Payment will be processed by Engineer as provided in the General Conditions.

6.02. Progress Payments; Retainage

A. Owner shall make progress payments on account of the Contract Price on the basis of Contractor's Applications for Payment on or about the 25th day of each month during performance of the Work as provided in Paragraph 6.02.A.1 below. All such payments will be measured by the schedule of values established as provided in Paragraph 2.05.A of the General Conditions (and in the case of Unit Price Work based on the number of units completed) or, in the event there is no schedule of values, as provided in the General Requirements.

1. Prior to Substantial Completion, progress payments will be made in an amount equal to the percentage indicated below but, in each case, less the aggregate of payments previously made and less such amounts as Engineer may determine or Owner may withhold, including but not limited to liquidated damages, in accordance with Paragraph 15.01 of the General Conditions.

a. Ninety-five percent of Work completed (with the balance being retainage).

b. Ninety-five percent of cost of materials and equipment not incorporated in the Work (with the balance being retainage).

B. Upon Substantial Completion, Owner shall pay an amount sufficient to increase total payments to Contractor to ninety-nine percent of the

Work completed, less such amounts as Engineer shall determine in accordance with Paragraph 15.01.C.5 of the General Conditions and less two hundred percent of Engineer's estimate of the value of work to be completed or corrected as shown on the tentative list of items to be completed or corrected attached to the certificate of Substantial Completion. If, at substantial completion, the character and progress of the work has been satisfactory, the OWNER may, at the OWNER'S sole discretion, reduce the amount of retainage being held.

6.03. Final Payment

A. Upon final completion and acceptance of the Work in accordance with Paragraph 15.06 of the General Conditions, Owner shall pay the remainder of the Contract Price, less one percent retainage, as recommended by Engineer as provided in said Paragraph 15.06.

B. Upon receipt of final tax release from the Idaho State Tax Commission, Owner shall pay the remaining one percent of the Contract Price.

ARTICLE 7 – INTEREST

7.01. All moneys not paid when due as provided in Article 15 of the General Conditions shall bear interest at the rate of 12 percent per annum.

ARTICLE 8 – CONTRACTOR'S REPRESENTATIONS

8.01. In order to induce Owner to enter into this Agreement, Contractor makes the following representations:

A. Contractor has examined and carefully studied the Contract Documents, and the other related data identified in the Bidding Documents.

B. Contractor has visited the Site and become familiar with and is satisfied as to the general, local, and Site conditions that may affect cost, progress, and performance of the Work.

C. Contractor is familiar with and is satisfied as to all federal, state, and local Laws and Regulations that may affect cost, progress, and performance of the Work.

D. Contractor has carefully studied all: (1) reports of explorations and test of subsurface conditions at or contiguous to the Site and all

drawings of physical conditions relating to existing surface or subsurface structures at the Site (except Underground Facilities), if any, that have been identified in Paragraph SC-5.03 of the Supplementary Conditions, and (2) reports and drawings of Hazardous Environmental Conditions, if any, at the Site that have been identified in Paragraph SC-5.06 of the Supplementary Conditions.

E. Contractor has considered the information known to Contractor; information commonly known to contractors doing business in the locality of the Site; information and observations obtained from visits to the Site; the Contract Documents; and the Site related reports and drawings identified in the Contract Documents, with respect to the effect of such information, observations, and documents on (1) the cost, progress, and performance of the Work; (2) the means, methods, techniques, sequences, and procedures of construction to be employed by Contractor, including any specific means, methods, techniques, sequences, and procedures of construction expressly required by the Contract Documents; and (3) Contractor's safety precautions and programs.

F. Based on the information and observations referred to in Paragraph 8.01.E above, Contractor does not consider that further examinations, investigations, explorations, tests, studies, or data are necessary for the performance of the Work at the Contract Price, within the Contract Times, and in accordance with the other terms and conditions of the Contract Documents.

G. Contractor is aware of the general nature of work to be performed by Owner and others at the Site that relates to the Work as indicated in the Contract Documents.

H. Contractor has given Engineer Written notice of all conflicts, errors, ambiguities, or discrepancies that Contractor has discovered in the Contract Documents, and the written resolution thereof by Engineer is acceptable to Contractor.

I. The Contract Documents are generally sufficient to indicate and convey understanding of all terms and conditions for performance and furnishing of the Work.

J. The Contractor is an appropriately licensed public works contractor per Section 54-1902 (Idaho Code).

K. Contractor shall comply with all Laws and Regulations applicable to the performance of the Work. Except where otherwise expressly

required by applicable Laws and Regulations, neither Owner nor Engineer shall be responsible for monitoring Contractor's compliance with any Laws or Regulations.

ARTICLE 9 – CONTRACT DOCUMENTS

9.01. Contents

A. The Contract Documents consist of the following:

1. This Agreement (pages 1 to 10, inclusive).
2. Performance bond (pages 1 to 3, inclusive).
3. Payment bond (pages 1 to 3, inclusive).
4. Other bonds (pages ___ to ___, inclusive).
   a. _____ (___ to ___, inclusive).
   b. _____ (___ to ___, inclusive).
   c. _____ (___ to ___, inclusive).
5. General Conditions – Division 100 of the Idaho Standards for Public Works Construction.
6. Supplementary Conditions (pages 1 to 10, inclusive).
7. Special Provisions (pages 1 to 8, inclusive).
8. Standard Specifications and Standard Drawings – City of Idaho Falls Standard Drawings and Specifications (including by reference the Idaho Standards for Public Works Construction).
9. Drawings consisting of 3 sheets with each sheet bearing the following general title: Elevated Water Tower Supply Line
10. Addenda (numbers ___ to ___, inclusive).
11. Exhibits to this Agreement (enumerated as follows):
    a. Contractor's Cost Proposal (pages ___ to ___, inclusive, attached).
    b. Documentation submitted by Contractor prior to Notice of Award (pages ___ to ___, inclusive, attached).

12. The following which may be delivered or issued on or after the Effective Date of the Agreement:

    a. Notice to Proceed (pages 1 to 1, inclusive).

    b. Work Change Directives.

    c. Change Orders.

B. The documents listed in Paragraph 9.01.A above are not attached to this Agreement (except as expressly noted otherwise above).

C. There are no Contract Documents other than those listed above in this Article 9.

D. The Contract Documents may only be amended, modified, or supplemented as provided in the Contract.

ARTICLE 10 – MISCELLANEOUS

10.01. Terms

A. Terms used in this Agreement will have the meanings stated in the General Conditions and the Supplementary Conditions.

10.02. Assignment of Contract

A. No assignment by a party hereto of any rights under or interests in the Contract will be binding on another party hereto without the written consent of the party sought to be bound; and specifically but without limitation, moneys that may become due and moneys that are due may not be assigned without such consent (except to the extent that the effect of this restriction may be limited by law), and unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under the Contract Documents.

10.03. Successors and Assigns

A. Owner and Contractor each binds itself, its partners, successors, assigns, and legal representatives to the other party hereto, its partners, successors, assigns, and legal representatives in respect to all covenants, agreements, and obligations contained in the Contract Documents.

10.04. Severability

A. Any provision or part of the Contract Documents held to be void or unenforceable under any Law or Regulation shall be deemed stricken, and all remaining provisions shall continue to be valid and binding upon Owner and Contractor, who agree that the Contract Documents may be reformed to replace such stricken provision or part thereof with a valid and enforceable provision that comes as close as possible to expressing the intention of the stricken provision.

10.05. Non-Discrimination

A. In addition to the federal Title VI requirements elsewhere in the Contract Documents, Contractor shall comply with the provisions of Title 5, Chapter 11, City of Idaho Falls City Code. Contractor shall not discriminate against any employee or applicant for employment on the basis of race, color, religion, creed, political ideals, sex, age, marital status, physical or mental handicap, gender identity/expression, sexual orientation, or national origin.

10.06. Contractor's Certifications

A. Contractor certifies that it has not engaged in corrupt, fraudulent, collusive, or coercive practices in competing for or in executing the Contract. For the purposes of this Paragraph 10.06:

1. "Corrupt practice" means the offering, giving, receiving, or soliciting of anything of value likely to influence the action of a public official in the bidding process or in the Contract execution;

2. "Fraudulent practice" means an intentional misrepresentation of facts made (a) to influence the bidding process or the execution of the Contract to the detriment of Owner, (b) to establish Bid or Contract prices at artificial non-competitive levels, or (c) to deprive Owner of the benefits of free and open competition;

3. "Collusive practice" means a scheme or arrangement between two or more Bidders, with or without the knowledge of Owner, a purpose of which is to establish Bid prices at artificial, non-competitive levels; and

4. "Coercive practice" means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the bidding process or affect the execution of the Contract.

B. Anti-Boycott Against Israel Act

1. Pursuant to Idaho Code section 67-2346, if payments under this Agreement exceed one hundred thousand dollars ($100,000) and Contractor employs ten or more persons, Contractor certifies that it is not currently engaged in and will not for the duration of this Agreement engage in, a boycott of goods or services from Israel or territories under its control. The terms in this paragraph that are defined in Idaho Code section 67-2346 shall have the meaning defined therein.

C. Certification of No Chinese Ownership

1. Pursuant to Idaho Code § 67-2359, the Awarded Proposer will be required to certify that it is not currently owned or operated by the government of the People's Republic of China and will not, for the duration of this Project, be owned or operated by the government of the People's Republic of China.

IN WITNESS WHEREOF, Owner and Contractor have signed this Agreement. Counterparts have been delivered to Owner and Contractor. All portions of the Contract Documents have been signed or have been identified by Owner and Contractor or on their behalf.

This Agreement will be effective on _____ (which is the effective Date of the Agreement).

OWNER:

City of Idaho Falls

By: _____

Title: Mayor

(seal)

Attest: _____

Title: City Clerk

Address for giving notices:

PO Box 50220

Idaho Falls, ID 83405

CONTRACTOR:

JM Concrete Inc.

By: [signature]

Title: President

(If Contractor is a corporation, a partnership, or a joint venture, attach evidence of authority to sign.)

(seal)

Attest: Valerie Miller

Title: Secretary

Address for giving notices:

1160 Jones Street

Idaho Falls, ID

8340

Idaho Public Works Contractors License No.: PWC-C-16464-U-4

Federal EIN Number No.: 20-4778413

Elevated Water Tower Supply Line
Project No. 2-37-24-1-WTR-2020-35

(All items must have "Unit Price" and "Total Amount" filled in)

Item No.	Ref. No.	Description	Estimated Quantity	Unit	Unit Price		Total Amount	
					Dollars	Cts	Dollars	Cts
		DIVISION 200 - EARTHWORK						
2.01	201.4.1.C.1	Removal of Obstructions	1	LS	$ 40,000	00	$ 40,000	00
2.02	201.4.1.D.1	Removal of Concrete	69	SY	$ 25	00	$ 1,725	00
2.03	201.4.1.E.1	Removal of Curb and Gutter	330	LF	$ 20	00	$ 6,600	00
2.04	201.4.1.F.1.a	Removal of Hydrant	1	EA	$ 5,000	00	$ 5,000	00
2.05	201.4.1.F.1.b	Removal of Tree	1	EA	$ 5,000	00	$ 5,000	00
2.06	202.4.1.D.1	Excavation	1	LS	$ 212,000	00	$ 212,000	00
		DIVISION 300 - TRENCHING						
3.01	302.4.1.B.1	Rock Excavation	200	LF	$ 261	00	$ 52,200	00
3.02	307.4.1.A.1	Miscellaneous Surface Restoration (Landscaping)	19	LF	$ 100	00	$ 1,900	00
3.03	307.4.1.F.1	Main Line Type "P" Surface Restoration (Asphalt Roadway)	397	LF	$ 100	00	$ 39,700	00
3.04	307.4.1.G.1	Type "P" Surface Restoration (Asphalt Roadway)	395	SY	$ 50	00	$ 19,750	00
		DIVISION 400 - WATER						
4.01	401.4.1.A.1.d	Water Main Pipe -- Size 16"	70	LF	$ 100	00	$ 7,000	00
4.02	401.4.1.A.1.e	Water Main Pipe -- Size 18"	528	LF	$ 100	00	$ 52,800	00
4.03	402.4.1.A.1.c	Butterfly Valve -- Size 12"	1	EA	$ 2,500	00	$ 2,500	00
4.04	402.4.1.A.1.e	Butterfly Valve -- Size 18"	2	EA	$ 2,500	00	$ 5,000	00
4.05	403.4.1.A.1	Hydrant	1	EA	$ 5,000	00	$ 5,000	00
4.06	404.4.1.A.1	Water Service Connection, Size 1.5"	1	EA	$ 3,500	00	$ 3,500	00
		DIVISION 700 - CONCRETE						
7.01	706.4.1.A.7.a	Curb and Gutter, Type Standard	45	LF	$ 60	00	$ 2,700	00
7.02	706.4.1.E.1.b	Concrete Sidewalks, thickness 5"	69	SY	$ 90	00	$ 6,210	00
		DIVISION 2000 - MISCELLANEOUS						
20.01	2040.4.1.A.1	Fence, Type Chain Link	48	LF	$ 40	00	$ 1,920	00
		TOTAL					$ 470,505	00

Memorandum

File #: 25-217 **City Council Meeting**

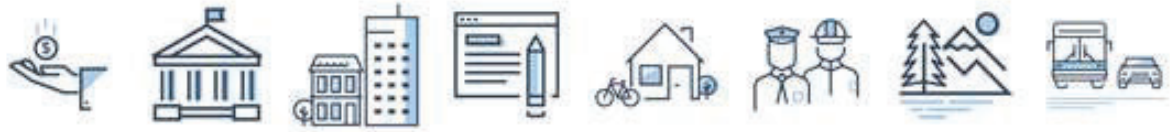
FROM: Chris H Fredericksen, Public Works Director
DATE: Wednesday, April 2, 2025
DEPARTMENT: Public Works

Subject
Cooperative Agreement and Resolution with the Idaho Transportation Department for City of Idaho Falls Lighting Upgrades

Council Action Desired
☐ Ordinance ☒ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Cooperative Agreement and Resolution with the Idaho Department of Transportation (ITD) for the City of Idaho Falls Lighting Upgrades project and authorize the Mayor and City Clerk to sign the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
Attached for your consideration is a Cooperative Agreement and Resolution with ITD for the City of Idaho Falls Lighting Upgrades project. The agreement stipulates that lighting design, bidding and contract administration will be completed by City forces and be reimbursed by the State.

Alignment with City & Department Planning Objectives



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This Agreement supports the community-oriented results of livable, and safe and secure community by improving roadway illumination along several arterial corridors.

Interdepartmental Coordination
Project reviews will be conducted with all necessary city departments to ensure coordination of project activities.

Fiscal Impact
According to the agreement, the City will be reimbursed for project expenditures up to the established not to exceed amount of $2,312,800.00. Construction is anticipated for fiscal year 2026 and proposed expenditures and reimbursements will be requested in the upcoming budget.

Legal Review
The Agreement has been reviewed by the City Attorney.

2025-022

COOPERATIVE AGREEMENT
PROJECT NO. A023(247)
CITY OF IDAHO FALLS LIGHTING UPGRADE
BONNEVILLE COUNTY
KEY NO. 23247

PARTIES

THIS AGREEMENT is made and entered this _____ day of _____, _____ by and between the **IDAHO TRANSPORTATION DEPARTMENT**, hereafter called the State, and **CITY OF IDAHO FALLS**, hereafter called the City.

PURPOSE

The State has programmed a project to replace aging illumination within the city limits. The current lighting has met its useful life and is in need of replacement. The work includes light poles, conduit, wiring or as needed to maintain the lighting in working conditions. This agreement will provide for the responsibilities of the parties regarding the City of Idaho Falls Lighting Upgrades.

Authority of this Agreement is established by Section 40-317, Idaho Code.

The parties agree as follows:

SECTION I. That the State will:

1. Review and approve the construction plans provided by the City.
2. Review and approve City's low bid recommendation to award. CN money will be awarded from the low bid plus 10% not to exceed $2,080,800.00
3. Provide a final inspection at completion of the project.
4. On or after July 1, 2026, and upon receipt of itemization of costs of the project, reimburse the City for the cost of the work, not to exceed the following:
    a. Design PC $90,000.00
    b. Construction Inspection CC $142,000.00
    c. Construction CN $2,080,800.00

SECTION II. That the City will:

1. Design the project per City of Idaho Falls standards and provide the construction plans to the State for review and approval. Such costs for this work will be reimbursed, not too exceed $90,000.00.

2. Award a contract for construction of the project using City of Idaho Falls process.

3. Provide construction inspection and administration of the project. This project is State funded and does not require Buy America Certification. Such costs for this work will be reimbursed, not to exceed $142,000.00. Testing and Inspection will be performed by the city having WAQTC & IQP qualifications.

4. Upon completion of the project, submit to the State an itemization of the costs of the project. Costs for construction will be reimbursed not to exceed $2,080,800.00. Acceptance will be based upon a written letter from the City stating that the project was constructed per City standards. A ITD materials summary report is not required for this project.

5. Maintain the project in accordance with the current maintenance agreement in effect between the City and the State.

SECTION III. It is agreed that:

1. This Agreement shall become effective on the date the agreement is signed, and shall remain in full force and effect until amended, replaced, or terminated upon the mutual consent of the City and the State.

EXECUTION

This Agreement is executed for the State by its District Engineer for District 6, and executed for the City by the Mayor, attested to by the City Clerk , with the imprinted corporate seal of the City of Idaho Falls.

IDAHO TRANSPORTATION DEPARTMENT

_____
District Engineer

ATTEST:

_____
City Clerk

(SEAL)

By regular/special meeting
on _____.

CITY OF IDHO FALLS

_____
Mayor

wd: 23247 Cooperative Agreement

RESOLUTION

WHEREAS, the **IDAHO TRANSPORTATION DEPARTMENT**, hereafter called the **STATE**, has submitted an Agreement stating obligations of the **STATE** and the **CITY OF IDAHO FALLS**, hereafter called the **CITY,** for construction of lighting upgrades; and

WHEREAS, the **STATE** is responsible for obtaining compliance with laws, standards and procedural policies in the development, construction and maintenance of improvements made to the Federal-aid Highway System; and

WHEREAS, the **STATE** is providing funds for this project; and

NOW, THEREFORE, BE IT RESOLVED:

1. That the Cooperative Agreement to construct lighting upgrades within city limits is hereby approved.

2. That the Mayor and the City Clerk are hereby authorized to execute the Agreement on behalf of the **CITY.**

3. That duly certified copies of the Resolution shall be furnished to the Idaho Transportation Department.

CERTIFICATION

I hereby certify that the above is a true copy of a Resolution passed at a *regular, duly* called special (X-out non-applicable term) meeting of the City Council, City of Idaho Falls, held on _____, _____.

(Seal) _____

City Clerk

Memorandum

File #: 25-207 **City Council Meeting**

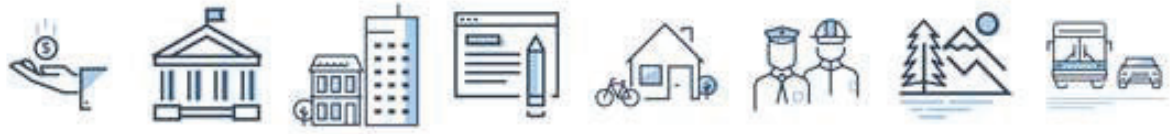
FROM: Pam Alexander, Municipal Services Director
DATE: Wednesday, March 26, 2025
DEPARTMENT: Municipal Services

Subject
Bid IF-25-018, 2025 Water Line Concrete and Asphalt Surface Repair for Public Works

Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Accept and approve the bid received from the lowest responsive and responsible bidder, JM Concrete, for an estimated total of $776,595.00 (or take other action deemed appropriate).

Description, Background Information & Purpose
A total of two bids were received for this project. This purchase includes various units of curb and gutter, concrete, rebar, and plant mix to support 2025 water line surface repair projects for the Public Works, Water Division. The total estimate of $776,595.00 is based on a three-year historical unit quantities for water line surface repair projects.

Alignment with City & Department Planning Objectives



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This purchase supports the community-oriented result of reliable public infrastructure by providing materials required for water line surface repair products throughout the city.

Interdepartmental Coordination
Public Works concurs with the award recommendation.

Fiscal Impact
Funds to purchase the water line surface repair materials are contained within the 2024/25 Public Works, Water Division operating budget.

Legal Review
The Legal Department concurs that the Council action complies with state statute.

City of Idaho Falls

Municipal Services Department

Bid Tabulation

Project: 2025 Water Line Concrete and Asphalt Surface Repair **Number**: IF-25-018

NOTE: Bids submitted were per UOM, award total is estimated using three year historical data

Submitted: Municipal Services Finance Division **Date:** March 20th, 2025

				JM Concrete				Knife River Corporation			
Project	Group	Item No.	Description	Bid	Estimated Usage	Comment	Awarded Amount	Bid	Estimated Usage	Comment	Total
2025 Water Line Concrete/asphalt surface repair	1 - Surface Repair	1	Placement of Curb & Gutter (3 year average quantities:1825 LF)	$58.00	1825		$105,850.00	$65.00	1825		$ 118,625.00
2026 Water Line Concrete/asphalt surface repair	2 - Surface Repair	2	Placement of 4" concrete (3 year average quantities: 10,190 SF)	$19.50	10190		$198,705.00	$21.00	10190		$ 213,990.00
2027 Water Line Concrete/asphalt surface repair	3 - Surface Repair	3	Placement of 5" concrete (3 year average quantities: 40 SF)	$20.00	40		$800.00	$22.00	40		$ 880.00
2028 Water Line Concrete/asphalt surface repair	4 - Surface Repair	4	Placement of 7" concrete (3 year average quantities: 0 SF)	$25.00	0		$0.00	$25.00	0		$ -
2029 Water Line Concrete/asphalt surface repair	5 - Surface Repair	5	Placement of 8" concrete with rebar (3 year average quantities: 0 SF)	$35.00	0		$0.00	$52.00	0		$ -
2030 Water Line Concrete/asphalt surface repair	6 - Surface Repair	6	Plantmix (3 year average quantities: 4,760 SY)	$99.00	4760		$471,240.00	$105.00	4760		$ 499,800.00
Total 1				$256.50		Award total	$776,595.00	$290.00			$ 833,295.00

Memorandum

File #: 25-209 **City Council Meeting**

FROM: Michael Kirkham
DATE: Thursday, March 27, 2025
DEPARTMENT: City Attorney

Subject
Amendment to Naming Rights Agreement with Frontier Credit Union

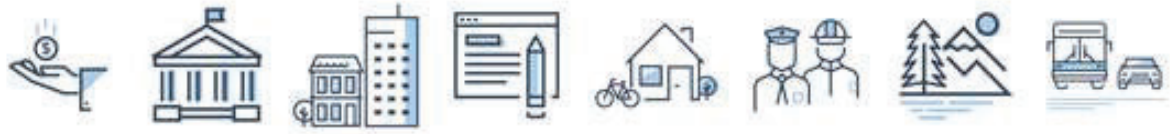
Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Amendment to the Naming Rights Agreement with Frontier Credit Union (or take other action deemed appropriate).

Description, Background Information & Purpose
On September 18, 2023, the City and Frontier Credit entered into a Naming Rights Agreement to rename the Idaho Falls Civic Center for the Performing Arts to the Frontier Center for the Performing Arts. In exchange for the right to maintain the name as the Frontier Center for a term of forty (40) years, Frontier Credit Union agreed to pay a Rights Fee to the City in the amount of $3,500,000.

On December 15, 2024, the City received bids for the lobby expansion for the Frontier Center for the Performing Arts. The low bid exceeded the amounts budgeted for the lobby expansion. The Frontier Credit Union offered to help make up the shortfall for the lobby expansion in exchange for an Amendment to the Naming Agreement.

The Amendment would extend the term of the Naming Rights Agreement for an additional ten (10) years, for a total of fifty (50) years, in exchange for an additional nine-hundred thousand dollars ($900,000) toward the Rights Fee, for a total of $4,400,000.

Alignment with City & Department Planning Objectives



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This action promotes the Financial Sustainability Community-oriented Result.

Interdepartmental Coordination
The Municipal Services and Legal departments coordinated on this amendment.

Fiscal Impact
The Amendment will provide an additional $900,000 in revenue for the Frontier Center lobby expansion project.

Legal Review
The Legal Department has reviewed and given approval to the proposed amendment.

AMENDMENT TO THE NAMING RIGHTS AGREEMENT
IDAHO FALLS CIVIC CENTER FOR THE PERFORMING ARTS

THIS AMENDMENT TO THE NAMING RIGHTS AGREEMENT (hereinafter "Amendment") is entered into this day _____ of _____, 2025, by and between by and between the CITY OF IDAHO FALLS, IDAHO (hereinafter referred to as "CITY"), a municipal corporation and political subdivision of the State of Idaho, whose mailing address is P.O. Box 50220, Idaho Falls, ID 83402 and FRONTIER CREDIT UNION, formerly known as East Idaho Credit Union, a not-for-profit Idaho state-chartered financial institution, whose mailing address is P.O. Box 1865, Idaho Falls, ID 83401 (hereinafter referred to as "FRONTIER").

WHEREAS, on September 18, 2023, CITY and FRONTIER entered into a Naming Rights Agreement (hereinafter "Agreement") to rename the Idaho Falls Civic Center for the Performing Arts, located at 501 S. Holmes Ave., Idaho Falls, Idaho 83401, to the Frontier Center for the Performing Arts ("Frontier Center") and to move forward with a second phase of improvements to improve and expand the Frontier Center's lobby; and

WHEREAS, the low bid to construct the Frontier Center lobby improvements exceeded the amounts budgeted for the second phase; and

WHEREAS, CITY and FRONTIER desire to commence with constructing the second phase improvements; and

WHEREAS, in exchange for additional contributions towards the Frontier Center improvements, CITY is willing to extend the term of the Agreement as described in this Amendment.

THEREFORE, in consideration of the mutual promises below, the Parties agree to amend the Agreement to read as follows:

1. **Amendment.** Section 2 "Term" of the Agreement is amended and replaced in its entirety to read as follows:

   2. **Term.** The term of this Agreement shall commence on September 30, 2023 and continue for a term of fifty (50) years (the "Initial Term"), unless otherwise terminated pursuant to the provisions of this Agreement.

      (a) **Renewal Option.** FRONTIER shall have the right to extend the Initial Term for an additional twenty (20) year term (the "Renewal Term") by giving written notice of the intent to renew to CITY. Such notice of renewal shall be given no later than ninety (90) days before the expiration of the Initial Term. Once FRONTIER exercises its right to renew, the Parties shall negotiate the renewal fee and the terms and conditions of the renewal in good faith. In no event shall the provisions under this paragraph be interpreted as a termination for convenience clause with respect to the Initial Term.

(b) **First Right of Refusal.** In the event the CITY receives a written offer from another third-party sponsor or vendor interested in sponsoring the CIVIC for a period of time after the expiration of the Initial Term ("Third-Party Offer") CITY shall provide written notice of its intent to accept such Third-Party Offer along with a copy of the Third-Party Offer, which Third-Party Offer shall include the terms and conditions upon which the offer is being made. Provided that FRONTIER is not in default under the terms of this Agreement, the CITY shall grant FRONTIER the first right of refusal ("First Right of Refusal"). Pursuant to the First Right of Refusal, FRONTIER shall have the right, but not the obligation to, tender an offer to CITY within sixty (60) days of receipt by FRONTIER of the CITY's notice of intent accept the Third-Party Offer on identical, similar or more favorable terms and conditions as outlined in the Third-Party Offer. If FRONTIER fails to timely exercise FRONTIER's First Right of Refusal, this Agreement shall be terminated as of the expiration of the Initial Term, unless otherwise agreed to in writing by the CITY and FRONTIER. For the sake of clarity, nothing in this Agreement shall be construed to restrain CITY from seeking or soliciting offers from third-party sponsors or vendors to sponsor the CIVIC during the Initial Term, provided that the term of any third-party sponsorship shall begin after the expiration of the Initial Term.

2. **Amendment.** Section 5 "Rights Fee" of the Agreement is amended and replaced in its entirety to read as follows:

5. **Rights Fee.** In consideration for the rights granted under this Agreement, FRONTIER hereby agrees to pay to CITY a rights fee ("Rights Fee") in the aggregate amount of **FOUR MILLION FOUR HUNDRED THOUSAND AND 00/100 DOLLARS ($4,400,000.00)**. The Rights Fee shall be payable in six (6) annual installments, as follows:

(a) Payment Installment Timing. The first payment installment shall be due on **January 1, 2024**, or such subsequent date as requested in writing by CITY, with subsequent, successive annual payment installments due on January 1st or subsequent date if requested in writing by CITY as follows:

1. Installment 1 - $700,000 – January 1, 2024
2. Installment 2 - $700,000 – January 1, 2025
3. Installment 3 - $750,000 – January 1, 2026
4. Installment 4 - $750,000 – January 1, 2027
5. Installment 5 - $750,000 – January 1, 2028
6. Installment 6 - $750,000 – January 1, 2029

(b) Accelerated Disbursements/Liquidity Considerations. The Parties shall use their mutual best efforts to promote FRONTIER's deposit products to the community in support of FRONTIER's ability and election to accelerate the

timing of disbursements of the Rights Fee. In the event CITY chooses to transfer its operating accounts, or any portion thereof with balances equal to or greater than the Rights Fee, to accounts held by FRONTIER, FRONTIER, at its sole and absolute discretion, may determine to accelerate disbursements under this Agreement if, in FRONTIER's business judgment, there is sufficient liquidity on its balance sheet and Frontier elects to do so.

(c) Creation of Deposit Account. To facilitate payment of the Rights Fee, upon execution of this Agreement, CITY shall become a member of FRONTIER and create a credit union account at FRONTIER for receipt of the payment installments due under this Agreement. All payments due hereunder shall be deposited into the account in CITY's name at FRONTIER. Payment installments will be considered "paid" upon FRONTIER's deposit into CITY's credit union account at FRONTIER.

(d) Renewal Term Fee: In the event that FRONTIER exercises its right for an additional twenty (20) year term, the parties shall use their mutual, good faith efforts to negotiate a mutually agreeable renewal fee.

(e) At the Council's direction, monies paid by FRONTIER to CITY under this Section of the Agreement may be deposited in the Civic Auditorium Capital Improvement Plan Fund (Fund 50) and expended from that Fund, as directed or approved by CITY Council.

3. **No Other Term Amended.** All other terms and conditions of the Agreement will remain in full force and effect, except as modified herein.

IN WITNESS WHEREOF, the parties through their duly authorized representatives have signed this Amendment the day and year first written above.

CITY OF IDAHO FALLS	FRONTIER CREDIT UNION
By_____	By_____
Rebecca L. Noah Casper, Mayor	Dan Thurman, President/CEO

Memorandum

File #: 25-211 **City Council Meeting**

FROM: Michael Kirkham, City Attorney
DATE: Tuesday, April 1, 2025
DEPARTMENT: City Attorney

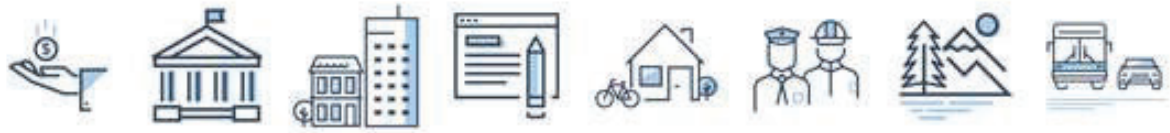
Subject
Ordinance Repealing the City's Daycare and Childcare Worker Licensing Regulations in Chapter 3, of Title 6, of the City Code.

Council Action Desired
☒ Ordinance ☐ Resolution ☐ Public Hearing
☐ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Ordinance repealing the daycare and childcare worker licensing regulations found in Chapter 3, of Title 6, of the City Code under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

Description, Background Information & Purpose
While the City has regulated daycare facilities and childcare workers for many years, the Idaho Legislature passed House Bill 243, preempting local regulation of daycare facilities and their workers. Under this new state law, the City of Idaho Falls no longer has the authority to regulate daycare and daycare facilities beyond July 1, 2025. After that date, the Idaho Department of Health and Welfare will establish and oversee all daycare licensing requirements.

Discontinuing the City's daycare licensing now will accelerate the transition to Department of Health and Welfare. Currently, if an Idaho city does not regulate a daycare facility, the facility is obligated to license with the Department. If the City discontinues daycare regulation now, it will eliminate the possibility of a "gap" in the health and safety guarantees for daycare consumers.

Alignment with City & Department Planning Objectives



☐ ☒ ☐ ☐ ☐ ☐ ☐ ☐

This ordinance promotes the Good Governance Community-oriented result.

Interdepartmental Coordination
The Legal Department and the Clerk's Office collaborated on this action.

Fiscal Impact
Discontinuation of daycare and childcare worker licensing will affect revenues from licensing fees. The loss in revenue will be partially offset by reduced enforcement activity for daycare facilities. In addition, fire inspection of daycare facilities will still be required under the new law. Local daycare facilities may still rely upon the Idaho Falls Fire Department to provide inspections. The City charges a nominal fee for the inspection service.

Legal Review
The Legal Department prepared the proposed ordinance.

ORDINANCE NO. _____

AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; REPEALING CHAPTER 3 OF TITLE 6 TO REPEAL THE CITY'S REGULATION OF DAY CARE FACILITIES AND WORKERS; PROVIDING SEVERABILITY, CODIFICATION, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE.

WHEREAS, for many years, the City enforced health and safety standards for daycare facilities and childcare workers in the City; and

WHEREAS, the Idaho Legislature has passed House Bill 243, which preempts Idaho's cities from adopting local regulation of daycare facilities; and

WHEREAS, the Council is committed to following the law.

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, THAT:

SECTION 1: Title 6, Chapter 3 of the City Code of the City of Idaho Falls, Idaho, is hereby rescinded in its entirety.

SECTION 2. Savings and Severability Clause. The provisions and parts of this Ordinance are intended to be severable. If any section, sentence, clause, or phrase of this Ordinance should be held to be invalid or unconstitutional by a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause, or phrase of this Ordinance.

SECTION 3. Codification Clause. The Clerk is instructed to immediately forward this Ordinance to the codifier of the official municipal code for proper revision of the Code.

SECTION 4. Publication and Effective Date. This Ordinance, or a summary thereof in compliance with Idaho Code, shall be published once in the official newspaper of the City, and shall take effect immediately upon its passage, approval, and publication.

[Intentionally Blank – Signature Page to Follow]

PASSED by the City Council and APPROVED by the Mayor of the City of Idaho Falls, Idaho, this _____ day of _____, 2025.

ATTEST: CITY OF IDAHO FALLS, IDAHO

_____ _____

EMILY GEISLER, CITY CLERK REBECCA L. NOAH CASPER, Ph.D., MAYOR

(SEAL)

STATE OF IDAHO)
) ss:
County of Bonneville)

I, EMILY GEISLER WILDE, CITY CLERK OF THE CITY OF IDAHO FALLS, IDAHO, DO HEREBY CERTIFY:

That the above and foregoing is a full, true and correct copy of the Ordinance entitled, "AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; REPEALING CHAPTER 3 OF TITLE 6 TO REPEAL THE CITY'S REGULATION OF DAY CARE FACILITIES AND WORKERS; PROVIDING SEVERABILITY, CODIFICATION, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE."

_____

EMILY GEISLER, CITY CLERK

(SEAL)

Memorandum

File #: 25-199 **City Council Meeting**

FROM: Wade Sanner, Director
DATE: Friday, March 21, 2025
DEPARTMENT: Community Development Services

Subject
Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards, MK Simpson Center Division No. 3

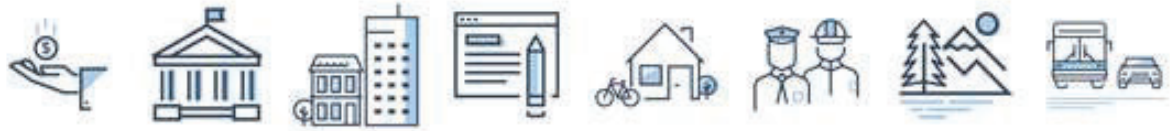
Council Action Desired
☐ Ordinance ☐ Resolution ☐ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
1. Approve the Development Agreement for the Final Plat for MK Simpson Center Division No. 3 and give authorization for the Mayor and City Clerk to sign said agreement (or take other action deemed appropriate).

2. Accept or Approve the Final Plat for MK Simpson Center Division No. 3 and give authorization for the Mayor, City Engineer, and City Clerk to sign said Final Plat (or take other action deemed appropriate).

3. Approve the Reasoned Statement of Relevant Criteria and Standards for the Final Plat for MK Simpson Center Division No. 3 and give authorization for the Mayor to execute the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
Attached is the application for the Final Plat, Development Agreement, and Reasoned Statement of Relevant Criteria and Standards for MK Simpson Center Division No. 3. The Planning and Zoning Commission considered this item at its January 7, 2025, meeting and unanimously voted to recommend approval of the final plat to the Mayor and City Council as presented.

Alignment with City & Department Planning Objectives



☐ ☒ ☒ ☐ ☒ ☐ ☐ ☐

A successful Plat should be consistent with the Comprehensive Plan and Zoning Ordinance, which includes policies and goals related to Growth, Sustainability, Transportation, and Livable Communities.

Interdepartmental Coordination
The Final Plat was reviewed by staff from Fire, Idaho Falls Power, BMPO, as well as the Water, Planning, Wastewater, and

Engineering/Survey Divisions.

Fiscal Impact
NA

Legal Review
This application has been reviewed by the Legal Department and is consistent with applicable law.

Zoning

PLT24-053 MK Simpson Div 3

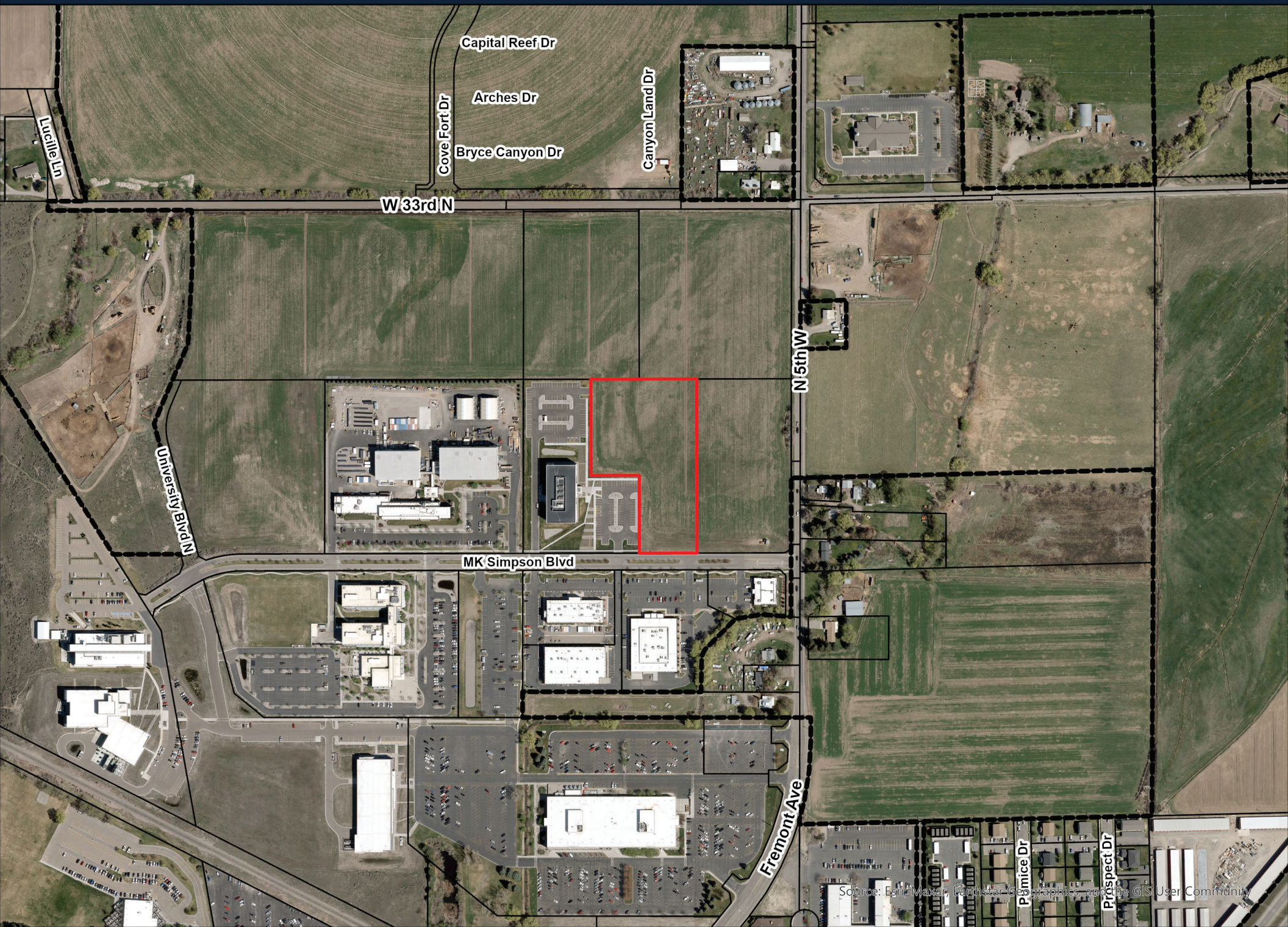
RE | R1 | TN | R3 | PB | LC | R&D | I&M

RP | R2 | RMH | R3A | CC | HC | LM | P

N

Aerial

PLT24-053 MK Simpson Div 3



MK SIMPSON CENTER DIVISION NO. 3
A SUBDIVISION OF THE CITY OF IDAHO FALLS, BONNEVILLE COUNTY, IDAHO
BEING IN PART OF THE NE 1/4 OF SECTION 12, TOWNSHIP 2 NORTH, RANGE 37 EAST, B.M.
(Sheet 1 of 2)

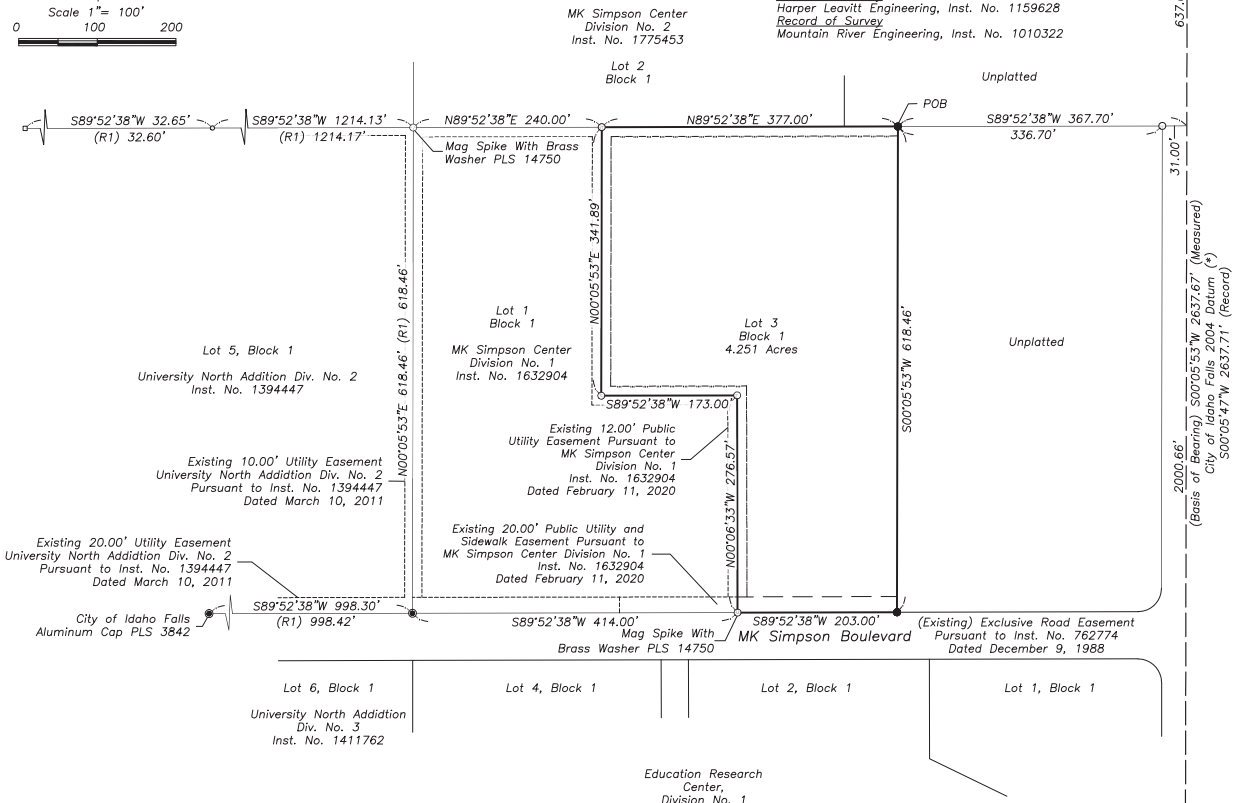
N

Scale 1"= 100'
0 100 200

Survey Narrative
Found monuments from University North Addition, Division 2, and MK Simpson Center Division No. 1 and MK Simpson Center Division No. 2 were used to extend platted and record geometry to establish the North, South and West boundary lines.

The East line of the subject Lot 3, Block 1 was established at the clients direction for site planning and design.

Relevant Surveys
Recorded Plat
MK Simpson Center Division No. 1, Inst. No. 1632904
Recorded Plat
MK Simpson Center Division No. 2, Inst. No. 1775453
Recorded Plat
University North Addition Division No. 2, Inst. No. 1394447
Recorded Plat
University North Addition Division No. 1, Inst. No. 1260545
Record of Survey
Harper Leavitt Engineering, Inst. No. 1159628
Record of Survey
Mountain River Engineering, Inst. No. 1010322



Northeast Corner Sec. 12
Found Aluminum Cap
C.P.&F. Instrument Number
1247948 PLS 3842

1 6
12 7

637.01'
31.00'
2000.66'
(Basis of Bearing) S00°05'53"W 2637.67' (Measured)
City of Idaho Falls 2004 Datum (*)
S00°05'47"W 2637.71' (Record)

5th West

12 7

East Quarter Corner Sec. 12
Found Aluminum Cap
C.P.&F. Instrument Number
1657309 PLS 9755

Legend
- PLSS Corner Control (As Noted)
- PLSS Corner Control (As Noted)
- Set 5/8" x 24" Iron Rod With Plastic Cap Stamped PLS 14750 (Unless Noted)
- Found 5/8" Iron Rod With Plastic Cap Stamped PLS 14750 (Unless Noted)
- Found City of Idaho Falls Brass Cap PLS 3842 (Unless Noted)
- Found 1/2" Rebar With Plastic Cap Stamped PLS 10944
- Found 1/2" Rebar With Plastic Cap Stamped PLS 827
- Section Line
- Subdivision Boundary and Lot Line
- 20' Public Utility and Sidewalk Easement
- 12' Public Utility Easement
- Existing Easement as Noted
- POB — Point of Beginning Boundary Description
- (R1) — Record Distance University North Addition Division 2, Inst. No. 1394447
- Inst. — Instrument
- C.P.&F. — Corner Perpetuation and Filing Record

(*) Basis of Bearing Note
All measured bearings shown hereon relate directly to the "City of Idaho Falls Coordinate System of 2004", which is derived from the Idaho State Plane Coordinate System (East Zone 1101) US survey feet and using a combined scale factor of 1.000277265 for a grid to ground conversion, [reference frame NAD_83(2011), epoch 2010.0000]. The system orientation is based on grid north along the East Zone central meridian. No convergence angle has been applied.

Idaho Falls Regional Airport Note
This property lies within noise impact area of Idaho Falls Regional Airport. Approaching and departing aircraft from Idaho Falls Regional Airport can be expected to fly over this property at approved and prescribed altitudes. Property owners and occupants will experience noise levels from aircraft engines. Noise levels may be intermittent and will vary depending on the location, approach and departure requirements, frequency, and type of aircraft

Acreage Summary
4.251 Acres Total

Surveyor's Certificate
I, Frank W. Peterson, a licensed professional land surveyor in the State of Idaho, do hereby certify that the survey of this subdivision, designated as MK SIMPSON CENTER, DIVISION NO. 3, was made under my direction, and that said subdivision is truly and correctly surveyed and staked as provided by law and in accordance with the accompanying plat as described hereon.

PROFESSIONAL LAND SURVEYOR LICENSED 14750 STATE OF IDAHO FRANK W. PETERSON

Preliminary

Frank W. Peterson License No. 14750 Date

jeff Freiberg ENGINEERING
Idaho Falls, Idaho (208) 220-6431

PETERSON LAND SURVEYING PLLC
Idaho Falls, Idaho (208) 313-5033

MK SIMPSON CENTER DIVISION NO. 3
A SUBDIVISION OF THE CITY OF IDAHO FALLS, BONNEVILLE COUNTY, IDAHO
BEING IN PART OF THE NE 1/4 OF SECTION 12, TOWNSHIP 2 NORTH, RANGE 37 EAST, B.M.
(Sheet 2 of 2)

OWNER'S Dedication

KNOW ALL MEN BY THESE PRESENTS: that the undersigned Gary L. Voigt, is the lawful OWNER of the tract of land included within the boundary description shown hereon and has caused the same to be platted and divided into blocks and lots which plat shall hereafter be known as MK SIMPSON CENTER DIVISION NO. 3, a subdivision of the City of Idaho Falls, Idaho, Bonneville County, Idaho.

BE IT FURTHER KNOWN, that OWNER does hereby grant and convey to the City of Idaho Falls all public easements forever as irrevocable permanent non–exclusive public easements as shown and described hereon.

OWNER, or his heirs and assigns, agree they will construct no permanent structure within or upon any easement shown hereon, and the City of Idaho Falls and its successors, assigns, permitees or licensees shall also have the right, to remove, cut or trim any trees, brush, ornamental shrubbery or plant which may injure or interfere with the use thereof for its intended purposes, such right may be exercised without prior notice to OWNER or his heirs, successors or assigns.

OWNER or his heirs, successors or assigns further agree that they shall not plant any trees, brush, ornamental shrubbery or plants which may hinder the safe and efficient utilization of said easements.

OWNER or his heirs, successors or assigns hereby releases the City of Idaho Falls and its successors, assigns, permitees or licensees from any claim for damages, based upon concealed or undisclosed private improvements constructed or permitted to be constructed by OWNER or his successors or assigns within any public easements, subsequent to recording this subdivision, that may be incurred as a result of the City of Idaho Falls and its successors, assigns, permitees or licensees ordinary use of the public easements with due care.

OWNER or his heirs, successors or assigns do hereby warrant and shall defend such dedication and conveyances in the quiet and peaceful possession of the public or the City of Idaho Falls, as the case may be, against said OWNER and his heirs, successors and assigns, and against every person whomsoever who lawfully holds or who later claims to have lawfully held any rights in said estate as of the date hereof.

IN WITNESS WHEREOF, OWNER has hereunto subscribed his seal and signature this _____ day of _____, 202__.

Owner,

_____

Gary L. Voigt

Acknowledgment

STATE OF Idaho)
:SS.
COUNTY OF Bonneville)

On this _____ day of_____, 20___, before me the undersigned, a notary public in and for said state, personally appeared Gary L. Voigt, known or identified to me to be the person whose name is subscribed in the attached OWNER'S Dedication and the Drinking Water System Certificate and acknowledged to me that he is authorized to execute the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and the year in this certificate first above written.

_____
Notary Public for the State of _____

Residing at: _____
Commission Expiration Date: _____

Examining Surveyor's Certificate

I certify that I am a licensed professional land surveyor in the State of Idaho and that I have examined this plat and find it complies with I.C. § 50–1305.

_____ _____
Date David Douglas Romrell, County Review Surveyor PLS 12223

Surveyor's Certificate

I, Frank W. Peterson, a licensed professional land surveyor in the State of Idaho, do hereby certify that the survey of this subdivision, designated as MK SIMPSON CENTER, DIVISION NO. 3, was made under my direction, and that said subdivision is truly and correctly surveyed and staked as provided by law and in accordance with the accompanying plat as described hereon.

Preliminary

_____
Frank W. Peterson License No. 14750 Date

PROFESSIONAL LAND SURVEYOR
LICENSED
14750
STATE OF IDAHO
FRANK W. PETERSON

Health Department Certificate of Approval

Sanitary restrictions as required by I.C. §50–1326 have been satisfied based on Department of Environmental Quality review and approval for the design plans and specifications and the conditions imposed on the developer for continued satisfaction of sanitary restrictions. Water and sewer line have been completed and services certified as available. Sanitary restrictions may be reimposed, in accordance with I.C. §50–1326, by the issuance of a certificate of disapproval.

EASTERN IDAHO PUBLIC HEALTH DISTRICT

_____ _____
ENVIRONMENTAL HEALTH SPECIALIST, REHS Date:

Drinking Water System Certificate

Pursuant to I.C. §50–1334, the OWNER does hereby, certify that all lots shown on this plat are eligible to receive water from the City of Idaho Falls municipal water system, and said City has agreed in writing to provide culinary water service to said lots pursuant to the provisions of Title 8, Chapter 4 of the Idaho Falls City Code, as amended from time to time.

IN WITNESS WHEREOF, OWNER has hereunto set his signature this ____ day of _____, 202__.

Owner,

_____

Gary L. Voigt

Recorders Certificate

I hereby certify that the foregoing plat MK SIMPSON CENTER, DIVISION NO. 3, was filed in the Office of the Recorder of Bonneville County, Idaho

_____
Bonneville County Recorder Date

Boundary Description

A parcel of land being part of the Northeast Quarter of Section 12, Township 2 North, Range 37 East, Boise Meridian, described as follows;

Commencing at the Northeast Corner of said Section 12 and running thence S00°05'53"W 637.01 feet along the East line of said Section 12, thence leaving said East line S89°52'38"W 367.70 to the True Point of Beginning, thence S00°05'53"W 618.46 feet to a point at the North right–of–way of MK Simpson Boulevard, thence along said North right–of–way S89°52'38"W 203.00 feet to the Southeast corner of Lot 1, Block 1 of the recorded subdivision of MK Simpson Center Division No. 1 having Instrument No. 1632904 within the Bonneville County, Idaho recorders office, thence along the Easterly boundary of said recorded subdivision the following three (3) courses; (1) leaving said North right–of–way N00°06'33"W 276.57 feet; (2) S89°52'38"W 173.00 feet (3) N00°05'53"E 341.89 feet, thence leaving said Easterly boundary N89°52'38"E 377.00 feet to the True Point of Beginning.

Above described property is subject to reservations pursuant to Instrument No. 1613813, dated July 17, 2019

Parcel contains 4.251 Acres.

Irrigation Water Rights Release

The property included in this plat has petitioned for and been removed from all future irrigation water rights.

Date: November 14, 2019 Instrument No. 1625041

Treasurer's Certificate

I, the undersigned County Treasurer in and for the County of Bonneville, State of Idaho, pursuant to the requirements of I.C. §50–1308, do hereby certify that all County property taxes due for the property included in the Boundary Description shown hereon are current.

_____ _____
Date Bonneville County Treasurer

City's Acceptance

The accompanying plat was duly accepted and approved and the grants and dedications are hereby accepted by the City Council of Idaho Falls adopted this adopted this ____day of_____, 202__.

_____ _____
Mayor City Clerk

_____ _____
City Engineer City Surveyor
Jonathan W. Knowles, PE 14787 Kenneth Baldwin Roberts, PLS 9755

jeff Freiberg ENGINEERING
Idaho Falls, Idaho (208) 220–6431

PETERSON LAND SURVEYING PLLC
Idaho Falls, Idaho (208) 313–5033

January 7 2025 7:00 p.m. Planning Department

City Annex Council Chambers

MEMBERS PRESENT: Commissioners Arnold Cantu, Glen Ogden, Dale Storer, Bill Scott, Forrest Ihler, Matthew Meehan.

MEMBERS ABSENT: Marsha McDaniel.

ALSO PRESENT: Assistant Planning Director Kerry Beutler, David Peterson Planner, Naysha Foster Planner, Caitlin Long Planner, Jacob Beck, Esq, City Attorney, and interested citizens.

CALL TO ORDER: Ogden called the meeting to order at 7:00 p.m.

ELECTION OF OFFICERS: Ogden asked if there are any nominations for officers.

Scott nominated Ogden for Chair and Ihler for Vice Chair. Storer seconded the nomination. Ogden asked for a voice vote. The nomination passed unanimously.

MINUTES: Scott moved to accept the minutes of December 3 2024, Ihler seconded the motion. The motion passed unanimously.

Business:

2. PLAT 24-053: FINAL PLAT for MK Simpson Center Division NO. 3.

Applicant: (Not present)

Peterson presented the staff report, a part of the record.

Meehan asked who the current owner of the property. Peterson indicated it is Gary Voigt.

Meehan recused himself from this item.

Storer moved to recommend to the Mayor and City Council approval of the Final Plat for MK Simpson Center Division No. 3, Cantu seconded the motion. Ogden called for roll call vote: Cantu, yes; Storer, yes; Ihler, yes; Ogden, yes; Scott, yes. The motion passed unanimously.

STAFF REPORT

FINAL PLAT
MK SIMPSON CENTER DIVISION NO. 3

April 10, 2025

IDAHO FALLS

Community Development Services

Applicant: Jeff Freiberg

Owner: Gary L. Voigt

Project Manager: David Peterson

Location: Generally, north of the MK Simpson Blvd, east of University Blvd, south of W 33rd North, west of N 5th West.

Size: Approximately 4.251 acres
Lots: 1

Existing Zoning:
Site: R&D
North: R&D
South: R&D
East: R&D
West: R&D

Existing Land Uses:
Site: Vacant, Ag
North: INL Campus
South: INL Campus
East: Vacant, Ag
West: INL Campus

Future Land Use Map:
Special use

Attachments:
1. Subdivision and Zoning Ordinance Requirements
2. Maps and aerial photos
3. Final Plat

Requested Action: To **approve** the Final Plat for MK Simpson Center Division No. 3 by the Mayor and City Council.

History: This property was annexed into the City in 2006 with an initial zoning of M-1. It was rezoned to R&D, Research and Development in 2018 as part of a city-wide rezone.

Staff Comments: The property is currently zoned R&D, Research and Development. The final plat includes 1 buildable lot on approximately 4.251 acres of land. The single lot has frontage on MK Simpson Blvd.

Access will come from MK Simpson Blvd. There are no lot size requirements or height restrictions in the R&D Zone. However, development will need to comply with the requirements of the Limited Development Airport Overlay Zone.

The Comprehensive Plan designates this area as Special Use which is set aside for types of land use that do not fit into broad use categories such as the INL campus and University Place, which are in the vicinity.

Staff Recommendation: Staff has reviewed the final plat and finds that it is consistent with the Comprehensive Plan and complies with the Subdivision and Zoning ordinances and recommends approval of MK Simpson Center Division No. 3.

Transportation Plan: MK Simpson Blvd – Major Collector

Subdivision Ordinance: Boxes with an "X" indicated compliance with the ordinance.

REQUIREMENTS	Staff Review
Requirements listed in Section 10-1:	
Building envelopes sufficient to construct a building.	X
Lot dimensions conform to the minimum standards of Zoning Ordinance.	X
Lots have full frontage on, and access to, a dedicated street.	X
Residential lots do not have direct access to arterial streets.	N/A, no residential lots
Direct access to arterial streets from commercial or industrial lots shall be permitted only where it can be demonstrated that: 1) The direct access will not impede the flow of traffic on the arterial or otherwise create an unsafe condition; 2) There is no reasonable alternative for access to the arterial via a collector street; 3) There is sufficient sight distance along the arterial from the proposed point of access; 4) The proposed access is located so as not to interfere with the safe and efficient functioning of any intersection; and 5) The developer or owner agrees to provide all improvements, such as turning lanes or signals, necessitated for the safe and efficient uses of the proposes access.	X
Adequate provisions shall be made for soil preservation, drainage patterns, and debris and waste disposal and collection.	X
Sidelines of lots shall be at, or near, right angles or radial to the street lines. All corner lots shall have a minimum radius of twenty feet on the property line.	X
All property within the subdivision shall be included within a lot or area dedicated for public use.	X
All corner lots zoned RP through R-3, inclusive, shall be a minimum of ten percent larger in area than the average area of all similarly zoned lots in the plat or subdivision under consideration.	X
All major streets in subdivision must conform to the major street plan of the City, as set forth in Comprehensive Plan.	X
The alignment and width of previously platted streets shall be preserved unless topographical conditions or existing buildings or structures required otherwise.	X
Residential lots adjoining arterial streets shall comply with: 1) Such lots shall have reverse frontage on the arterial streets, 2) such lots shall be buffered from the arterial street by any effective combination of the following: lot depth, earth berms, vegetation, walls or fences, and structural soundproofing, 3) Minimum lot depth shall be 150 ft except where the use of berms, vegetation, and structures can be demonstrated to constitute an effective buffer, 4) Whenever practical, existing roadside trees shall be saved and used in the arterial buffer, 5) Parking areas shall be used as part of the arterial buffer for high density residential uses, 6) Annexation and development agreement shall include provisions for installation and continued maintenance of arterial buffers.	N/A – no residential lots
Planning Director to classify street on basis of zoning, traffic volume, function, growth, vehicular & pedestrian safety, and population density.	No new streets

Section 10-1-9A

(9) If the final plat conforms to the provisions of this Chapter and all other applicable State or Federal laws, or local ordinances, the Council shall approve the final plat and authorize the Mayor and Clerk to sign the original plat.

Zoning Ordinance:

11-3-9: PURPOSE OF SPECIAL PURPOSE ZONES

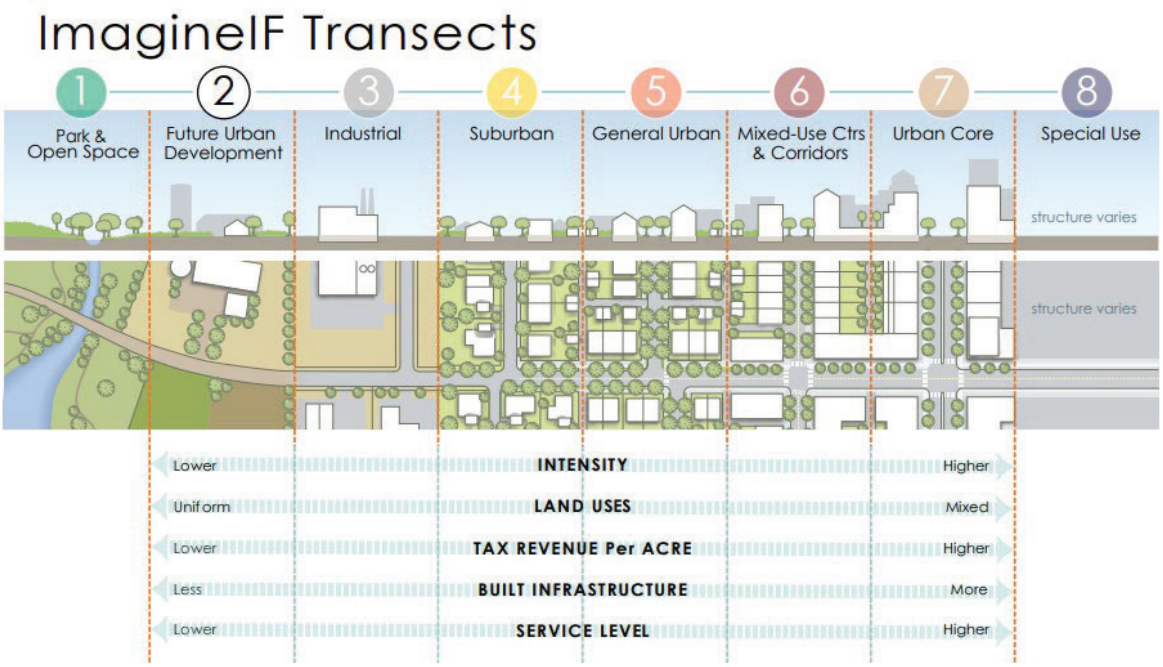
(A) R&D Research and Development Zone. This zone provides a special purpose zone in which the preliminary use of the land is a center for research, development, and higher education. This zone should be located close to transportation, public utilities, and other facilities necessary to support research and development and higher education facilities. This zone is also characterized by attractively designed buildings and off-street parking lots situated among trees, shrubs, and other landscape features.

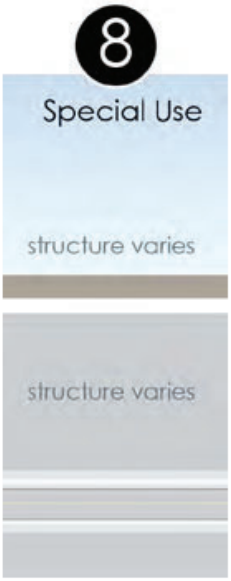
Table 11-3-7: Dimensional Standards for Special Zones

	R&D	P
Site Area- Minimum in acres	30*	1*
Setbacks – Minimum in ft.		
Front	30	30
Side	0/ 20 *	20
Rear	0/ 20 *	30
Building Height- Maximum in ft.	see sub-section (3) below*	35
Lot Coverage- Maximum in %	80	
*See explanations, exceptions and qualifications that follow in Section 11-3-10A (1-4) of this Zoning Code.		

Comprehensive Plan Land Use

Transects: pg. 60-70





8. **Special Use**

Snapshot: The Special Use Transect denotes specific types of land use which do not readily fit into broad use categories. Structures and amenities in this designation vary and are considered on a case-by-case basis.

Local examples: INL campus, University Place, CEI campus, Airport, Sewer Treatment Plant.

REASONED STATEMENT OF RELEVANT CRITERIA AND STANDARDS

APPROVAL OF THE FINAL PLAT FOR MK SIMPSON CENTER DIVISION NO. 3, GENERALLY LOCATED NORTH OF MK SIMPSON BLVD, EAST OF UNIVERSITY BLVD, SOUTH OF W 33RD NORTH, AND WEST OF N 5TH WEST.

WHEREAS, the applicant filed an application for a final plat on October 23, 2024; and

WHEREAS, this matter came before the Idaho Falls Planning and Zoning Commission during a duly noticed public meeting on January 7, 2025; and

WHEREAS, this matter came before the Idaho Falls City Council during a duly noticed public meeting on April 10, 2025; and

WHEREAS, having reviewed the application, including all exhibits entered and having considered the issues presented:

I. RELEVANT CRITERIA AND STANDARDS

1. The Planning and Zoning Commission considered the request pursuant to the City of Idaho Falls Comprehensive Plan, the City of Idaho Falls Zoning Ordinance, the City of Idaho Falls Subdivision Ordinance, the Local Land Use Planning Act, and other applicable development regulations.
2. The property is an approximately 4.251 acres of land located north of MK Simpson Blvd, east of University Blvd, south of W 33rd North, and west of N 5th West.
3. The final plat includes 1 buildable lot.
4. Access to the subdivision will come from MK Simpson Blvd.
5. The plat complies with all requirements of the Subdivision Ordinance.
6. The plat complies with all requirements of the Limited Development Airport Overlay Zone.
7. The proposed plat is consistent with the principles of the City's Comprehensive Plan and the R&D, Research and Development Zone.

II. DECISION

Based on the above Reasoned Statement of Relevant Criteria, the City Council of the City of Idaho Falls approved the Final Plat.

PASSED BY CITY COUNCIL OF THE CITY OF IDAHO FALLS

THIS _____ DAY OF _____, 2025

_____

Rebecca L. Noah Casper-Mayor

DEVELOPMENT AGREEMENT
MK SIMPSON CENTER DIVISION NO. 3

This DEVELOPMENT AGREEMENT MK SIMPSON CENTER DIVISION NO. 3 ("AGREEMENT"), made this _____ day of _____, 2025, by and between CITY OF IDAHO FALLS, IDAHO, a municipal corporation of the State of Idaho, ("CITY"), whose mailing address is P.O. Box 50220, Idaho Falls, Idaho 83405, and VOIGT CONSULTING, INC, ("DEVELOPER"), whose mailing address is P.O. Box 2044, Idaho Falls, Idaho 83405.

W I T N E S S E T H:

WHEREAS, DEVELOPER is the sole owner, in law or equity, of a certain tract of land in the County of Bonneville, State of Idaho, which land (hereafter referred to as "Subdivision"), is more particularly described in Exhibit "A" attached hereto and by this reference made a part hereof; and

WHEREAS, DEVELOPER desires to develop the Subdivision within CITY and has submitted a plat bearing the Subdivision name described in the caption of this AGREEMENT; and

WHEREAS, City Engineer, and the Idaho Falls Planning and Zoning Commission, have recommended such development be allowed, subject to certain requirements and obligations on the part of DEVELOPER; and

WHEREAS, CITY is willing to allow the development of the Subdivision within City of Idaho Falls, Idaho, subject to the terms and conditions of this AGREEMENT and the Special Conditions attached hereto; and

WHEREAS, CITY has authority to approve Subdivision plats and the construction of streets, utility lines and other public improvements within CITY; and

WHEREAS, DEVELOPER specifically waives DEVELOPER's right to protest development requirements described in this AGREEMENT, including DEVELOPER's right of judicial review contained in Chapter 52, Title 67, Idaho Code, and pursuant to the standards set forth in § 67-5279, Idaho Code; and

WHEREAS, DEVELOPER understands that the public improvements required herein are standards required pursuant to Idaho Falls City Code, Title 10, Chapter 1, and are authorized by Idaho Code §§ 67-6513 and 67-6518; and

WHEREAS, DEVELOPER and CITY believe that without the public improvements required

herein, CITY would not be able to otherwise provide for mitigation of the effects of the Subdivision development on the ability of CITY to deliver services without compromising quality of such service delivery to current CITY residents, or without imposing substantial additional costs upon current CITY residents to accommodate the proposed Subdivision; and

WHEREAS, CITY desires to ensure that public improvements consisting of those described in this AGREEMENT, including Special Conditions for the Subdivision, are constructed; and

WHEREAS, DEVELOPER understands that a waiver of public improvements is available pursuant to Idaho Falls City Code, but DEVELOPER specifically does not wish to request such a waiver and wishes to enter into this AGREEMENT; and

WHEREAS, DEVELOPER enters into this AGREEMENT of DEVELOPER's own free will and accord, without coercion and without inducement and at DEVELOPER's request; and

WHEREAS, DEVELOPER has read this AGREEMENT, has understood it, and has had the opportunity to avail itself of legal and other counsel prior to entering into this AGREEMENT and prior to signing it; and

WHEREAS, DEVELOPER has submitted a preliminary plat bearing the Subdivision name described in the caption of this AGREEMENT; and

WHEREAS, City Engineer and City Planning and Zoning Commission have recommended such Subdivision be approved subject to certain requirements and obligations on the part of DEVELOPER; and

WHEREAS, CITY is willing to approve the Subdivision to CITY, subject to the terms and conditions of this AGREEMENT and the Special Conditions attached hereto.

NOW, THEREFORE, in consideration of the covenants and conditions set forth herein, the Parties agree as follows:

1. Approval of Subdivision. CITY hereby approves the Subdivision plat as described in Exhibit "A" attached hereto and made a part to this AGREEMENT by reference and agrees that upon DEVELOPER's full and complete performance of the terms and conditions hereto, it will accept and maintain the property dedicated to CITY on the Subdivision plat and all public facilities and improvements shown in the Improvement Plans for the Subdivision.

2. Improvement, Preliminary, and Final Improvement Plans. "Improvement Plans," used in this AGREEMENT, are engineer-designed plans showing all streets, sewer lines, water lines,

storm drains, street signs, traffic control devices, barricades, other public utilities (telephone, gas, electricity, fiber optic and irrigation facilities) and other public improvements contemplated within the Subdivision. "Preliminary Improvement Plans" as used in this AGREEMENT, are those Improvement Plans submitted and considered for the Subdivision development prior to the approval of City Engineer, and not yet approved for construction. "Final Improvement Plans" as used in this AGREEMENT, are those Improvement Plans submitted, considered and approved by City Engineer for the Subdivision development.

DEVELOPER anticipates that development of the entire Subdivision will occur in phases or divisions. DEVELOPER has filed, and City Engineer has approved, Improvement Plans for the public improvements to be constructed within public rights-of-way exterior to the Subdivision, (hereafter referred to as the "Exterior Improvement Plans") showing the width, location and alignment of all streets, sewer lines and water lines within the Subdivision and the size and materials specifications for such water and sewer lines. Prior to the commencement of any construction or development within any phase or division of the Subdivision, DEVELOPER shall also file with, and obtain the approval of, City Engineer Improvement Plans (hereafter the "Interior Improvement Plans") for all streets, sewer lines, water lines, storm drainage facilities, street signs, traffic control devices, barricades and other public improvements contemplated within such phase or division of the Subdivision. The filed Improvement Plans shall also show the proposed location of other public utilities (telephone, gas and electricity), and irrigation facilities affected by the development of such phase or division of the Subdivision. Preliminary Improvement Plans are incorporated herein by reference as though set out in full, and the Final Improvement Plans shall also, upon approval by City Engineer, be deemed to be incorporated herein by reference.

3. Construction of Public Improvements. Unless otherwise agreed in the Special Conditions, DEVELOPER shall, at its expense, design and construct all public improvements shown in the Exterior Improvement Plans and Interior Improvement Plans. Unless otherwise agreed in writing by City Engineer, DEVELOPER shall construct all required public improvements within such Improvement Plans in strict accordance with the approved Preliminary and Final Improvement Plans and CITY Standard Engineering Drawings and Specifications (hereafter referred to as the "Standard Specifications") in effect at the time the construction is accomplished. The Standard Specifications are incorporated herein by reference as though set out in full and compliance to the Standard Specifications is a condition of this AGREEMENT.

4. Permits. DEVELOPER shall obtain all right-of-way, excavation and/or other permits required by local ordinance and comply with all requirements therein with respect to the timely performance of the work governed by such permits.

5. Inspection. DEVELOPER shall retain a professional engineer (hereafter referred to as the "Project Engineer") licensed within the State of Idaho to supervise, inspect and test the

construction of all public improvements within the Subdivision in order to ensure such improvements are constructed in accordance with this AGREEMENT, the Improvement Plans and the Standard Specifications. DEVELOPER shall not materially deviate from the Improvement Plans or Standard Specifications without the express written approval of the City Engineer.

6. Corrected Improvement Plans. Prior to acceptance of any phase or division of the Subdivision, DEVELOPER will file "As Constructed"/ "As Built" Improvement Plans (hereafter referred to as the "Corrected Improvement Plans") with City Engineer. Such Corrected Improvement Plans shall be prepared by the Project Engineer and shall show the actual constructed location of all public improvements within the Subdivision including the horizontal and vertical location of all water, sewer and storm drain lines, individual building service lines curb and gutter alignment and street grades. Such Corrected Improvement Plans shall also specifically show all changes between the Final Improvement Plans and the public improvements as actually constructed. The Project Engineer shall also certify upon the Corrected Improvement Plans that such Corrected Improvement Plans correctly show all public improvements as actually constructed and that such public improvements have been constructed in accordance with the Standard Specifications in effect at the time such construction was accomplished. The Project Engineer shall also deliver to City Engineer all compaction reports, daily construction logs, reports, written tests, analysis and other data as may be necessary to verify or support the certification of the Project Engineer.

7. Acceptance of Subdivision. Upon satisfactory completion of such public improvements and facilities, DEVELOPER's delivery of Corrected Improvement Plans and the filing and approval by CITY of a final plat, CITY will accept that portion of the Subdivision for which a final plat has been approved. Such acceptance shall not be valid unless expressly acknowledged in writing by City Engineer. Except as otherwise expressly provided in the Special Conditions, upon acceptance of any phase or division within the Subdivision, CITY shall assume ownership and control of all public facilities within any dedicated street or public utility right-of-way within the Subdivision and shall execute and record an instrument documenting such acceptance and that also references the recording information for this AGREEMENT and thereby releasing the Subdivision, or the accepted portion thereof, from the encumbrances of this AGREEMENT. Acceptance of the Subdivision Improvements and recording the acceptance instrument shall not be deemed as a waiver of DEVELOPER's agreement herein to fully and completely perform the terms and conditions of this AGREEMENT, or as a waiver or release of the warranty set forth below in this AGREEMENT.

8. Warranty. DEVELOPER warrants that the materials and workmanship employed in the construction of all public improvements within the Subdivision shall be good and sound, and shall conform to generally accepted standards within the construction industry. Such warranty shall extend for a period of one (1) year after acceptance of any phase or division of the Subdivision

within which such improvements are located, by CITY, provided nothing herein shall limit the time within which CITY may bring an action against DEVELOPER on account of DEVELOPER's failure to construct such improvements in accordance with this AGREEMENT, the Improvement Plans or the Standard Specifications. DEVELOPER, and DEVELOPER's heirs, successors and assigns, shall and do hereby respectively warrant and agree, to defend the quiet and peaceful possession of CITY in all easements, rights-of-way, street dedications or other estates conveyed pursuant to the terms of this AGREEMENT or pursuant to the subdivision plat which is the subject hereof, from and against all claims against DEVELOPER and DEVELOPER's successors or assigns, respectively, and against every person whomsoever who lawfully holds, or who later lawfully claims to have held, rights in the premises by or through DEVELOPER and DEVELOPER's successors or assigns, respectively, as of the date of this AGREEMENT.

9. Water and Sewer Main Connection Charges. DEVELOPER agrees to pay to CITY at the time any separate sanitary sewer service or culinary water service connection to CITY sanitary sewer system or culinary water system is requested, all connection fees, main connection charges, and main charges as set forth in the City Code in effect at the time such request for service is made.

10. Failure to Pay Fees. In the event DEVELOPER fails or refuses to pay any of the fees, charges or costs set forth herein, CITY may disannex any property owned by DEVELOPER within the Subdivision or declare the entire unpaid balance immediately due and payable and collect such sums in the manner provided by law, or may pursue any other remedy set forth herein or as may be available at law or in equity. All such remedies shall be cumulative and CITY may pursue the same separately or simultaneously as it deems necessary or appropriate. In the event of such acceleration, all sums due shall bear interest at the rate established by law for judgments entered in the State of Idaho, commencing on the date the unpaid amount is declared immediately due and written demand therefor is delivered to DEVELOPER.

11. Participation by CITY. The parties agree that those portions of the water main, the sanitary sewer line, storm drains and street section work (hereafter collectively referred to as the "Shared Work"), the cost of which CITY has expressly agreed to pay pursuant to the Special Conditions, including any water or sewer line or storm line extensions, increased line size or capacity and road width or thickness, are required because of future service needs originating from properties not owned by DEVELOPER and located within the vicinity of the Subdivision, and that sound planning requires construction thereof at the present time in order to accommodate future expansion and development. In recognition of the cost savings which can be accomplished by construction of such excess capacity and improvements concurrently with the facilities to be constructed for DEVELOPER's purposes, and the impracticality or impossibility of constructing such excess capacity and improvements separately or at a later time, DEVELOPER agrees to design and construct such facilities subject to CITY's agreement to reimburse DEVELOPER for a portion of such costs, all as set forth in the Special Conditions. Prior to the commencement of the

Shared Work, DEVELOPER shall obtain and deliver to CITY three (3) independent bona fide bids for the performance of such work from qualified and responsible contractors. Such bids shall be solicited and itemized in a manner which allows clear and specific identification of that portion of the construction work for which CITY is responsible. CITY shall have no obligation to pay for any portion of the costs of the Shared work unless prior to the commencement of the work, the parties have expressly agreed in writing to a specific amount for which CITY will reimburse the DEVELOPER. Payment of such costs by CITY shall be due within thirty (30) days from acceptance of the Subdivision by CITY and delivery of an itemized statement to CITY setting forth in detail the total amount of the costs for which CITY is responsible.

12. Special Conditions. In recognition of the unique circumstances relative to this Subdivision the parties agree to the Special Conditions attached hereto as Exhibit "B" and by this reference made a part hereof.

13. Irrigation Facilities. DEVELOPER shall relocate or reconstruct, at DEVELOPER's expense, all ditches, headgate structures, culverts, siphons, drywells or other similar appurtenant structures that will be impaired or otherwise disturbed by the construction of this Subdivision. DEVELOPER shall also obtain the consent of all persons or entities who have any water right or control over such structures. DEVELOPER shall also indemnify and hold CITY harmless from any action, claim, demand or cost of any kind, including attorney's fees and court costs, arising from the relocation or reconstruction of such facilities or DEVELOPER's failure to properly relocate or reconstruct such facilities.

14. Relocation of Power Lines. DEVELOPER shall relocate at its expense, all existing electric utility poles or other utility lines or fixtures necessary to construct the public improvements within this Subdivision as shown on the Improvement Drawings.

15. Construction Schedule Change. Any modification to the public improvements shown in the Improvement Drawings or to the construction phase limits shall be approved by City Engineer. Prior to said approval, revised Improvement Drawings shall be resubmitted to City Engineering Department showing the proposed changes.

16. Taxes and Assessments. DEVELOPER shall pay all real property taxes and assessments levied or assessed against any interest in real property which DEVELOPER has agreed to convey to CITY pursuant to this AGREEMENT up to the date the final Subdivision plat for this Subdivision is recorded. Such taxes and assessments shall be paid prior to the acceptance by CITY of the public improvements within any phase or division of the Subdivision.

17. Occupancy. No building or structure within the Subdivision shall be used or occupied for any purpose other than for the construction of such building or structure, unless a final plat has

been filed and approved and all public improvements within the plat have been completed and accepted by City Engineer. CITY may withhold Certificates of Occupancy until all such work has been completed. Nothing herein shall prevent the use of a model building for the purpose of DEVELOPER's sales promotional efforts provided the building is not occupied for any other commercial or industrial purposes.

18. Default. In the event DEVELOPER fails to comply with the terms and conditions hereof in any material respect, CITY may, without further notice to DEVELOPER, exercise any or all of the following remedies:

A. Withhold the issuance of any building permit or certificate of occupancy for any structure located within any phase or division of the Subdivision affected by such default;

B. Withhold the connection of water, sewer or electric service to any property located within any phase or division of the Subdivision affected by such default;

C. Refuse to accept public ownership and maintenance of public improvements within any phase or division of the Subdivision affected by such default and record a notice of such action with the Bonneville County Recorder's office;

D. Issue a stop work order for any building under construction within any phase or division of the Subdivision affected by such default;

E. Withhold reimbursement of Subdivision inspection fees collected pursuant to the Idaho Falls City Code; and

F. Bring an action for damages, injunctive relief, specific performance or any other remedy available at law or in equity.

19. Notices. Any notice required by this AGREEMENT shall be mailed to the receiving party at the address set forth above or such other address as may be delivered to the sending party in writing. Such notice shall be mailed by certified mail, return receipt requested, postage prepaid and addressed as set forth above and shall be deemed received upon its deposit in the United States mail in such manner.

20. Recording and Recording Fees. CITY may record this AGREEMENT with the Bonneville County Recorder's office and prior to the execution and approval of this AGREEMENT, DEVELOPER shall pay to CITY all recording fees necessary to record this AGREEMENT with the Bonneville County Recorder's office. Prior to the approval of any final plat within the Subdivision, DEVELOPER shall pay to CITY all recording fees necessary to record such final plat with the Bonneville County Recorder's office.

21. Compliance With Applicable Law and Regulation. DEVELOPER agrees to comply with all applicable rules, regulations, Ordinances, Resolutions, statutes or administrative laws having applicability to development to this Subdivision and or phase of this Subdivision including, of those of CITY, Bonneville County, the State of Idaho, the United States of America, or any agency or political subdivisions thereof having jurisdiction over the Subdivision and to obtain any permits, licenses, permissions, authorizations, etc., that are required for such development.

22. Conflict With Standard Specifications. In the event of any conflict between the terms of this AGREEMENT or the Improvement Plans and the Standard Specifications, the terms of this AGREEMENT or the Improvement Plans shall prevail over any contrary provision of the Standard Specifications. In the event of any conflict between the terms of this AGREEMENT and the Improvement Plans, the terms of this AGREEMENT shall prevail.

23. Covenants Appurtenant to the Land. All covenants and conditions set forth herein shall be appurtenant to and run with the Subdivision and shall be binding upon DEVELOPER's heirs, successors or assigns.

24. Governing Law. This AGREEMENT shall be governed by the laws of the State of Idaho. The venue for any action arising out of this Agreement shall be exclusively in the District Court of the Seventh Judicial District of the State of Idaho, Bonneville County or in the United States District Court for the District of Idaho.

25. Anti-Boycott Against Israel Act. Pursuant to Idaho Code section 67-2346, if payments under this AGREEMENT exceed one hundred thousand dollars ($100,000) and DEVELOPER employs ten (10) or more persons, DEVELOPER certifies that it is not currently engaged in, and will not for the duration of this AGREEMENT engage in, a boycott of goods or services from Israel or territories under its control. The terms in this Paragraph that are defined in Idaho Code section 67-2346 shall have the meaning defined therein.

26. Certification of No Chinese Ownership. Pursuant to Idaho Code 67-2359, DEVELOPER certifies that DEVELOPER is not currently owned or operated by the government of the People's Republic of China and will not, for the duration of this AGREEMENT, be owned or operated by the government of the People's Republic China.

27. Non-Discrimination. DEVELOPER shall not discriminate against any employee or applicant for employment on the basis of race, color, religion, creed, political ideals, sex, age, marital status, physical, or mental handicap, gender identity/expression, sexual orientation, or national origin.

28. Entire Agreement. This writing evidences the final and complete agreement between the

parties and no other prior statement, representation or understanding shall be binding upon the parties unless expressly set forth herein.

29. Effective Date. This AGREEMENT shall become valid and binding only upon its approval by CITY Council of CITY and upon its execution by the Mayor.

INWITNESS WHEREOF, the parties have hereunto set their hands and seals this day and year first above written.

ATTEST:

CITY OF IDAHO FALLS, IDAHO

By _____

Corrin Wilde, City Clerk

Rebecca L. Noah Casper, Ph.D., Mayor

VOIGT CONSULTING, INC.

By _____

Gary Voigt, Owner

STATE OF IDAHO)
) ss.
County of Bonneville)

On this _____day of _____, 2025, before me, the undersigned, a notary public for Idaho, personally appeared Rebecca L. Noah Casper, Ph.D., known to me to be the Mayor of the City of Idaho Falls, Idaho, the municipal corporation that executed the foregoing document, and acknowledged to me that they are authorized to execute the same for and on behalf of said City.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year first above written.

_____
Notary Public of Idaho
(Seal) Residing at: _____
My Commission Expires:_____

STATE OF IDAHO)
) ss:
County of Bonneville)

On this 4th day of March, 2025, before me, the undersigned, a notary public, in and for said State, personally appeared Gary Voigt, known or identified to me to be an authorized signator and whose name is subscribed to the within instrument and acknowledged to me that they are authorized to execute the same for and on behalf of said developer.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal, the day and year in this certificate first above written.

KELLY SUSAN VOGT
NOTARY PUBLIC
Comm. No. 51966
STATE OF IDAHO

(Seal)

Kelly Susan Vogt
Notary Public of Idaho
Residing at: Idaho Falls, Idaho
My Commission Expires: 3·13·2026

EXHIBIT "A"
PROPERTY

LEGAL DESCRIPTION
MK SIMPSON CENTER DIVISION NO. 3

A parcel of land being part of the Northeast Quarter of Section 12, Township 2 North, Range 37 East, Boise Meridian, described as follows;

Commencing at the Northeast Corner of said Section 12 and running thence S00°05'53"W 637.01 feet along the East line of said Section 12, thence leaving said East line S89°52'38"W 367.70 to the True Point of Beginning, thence S00°05'53"W 618.46 feet to a point at the North right-of-way of MK Simpson Boulevard, thence along said North right-of-way S89°52'38"W 203.00 feet to the Southeast corner of Lot 1, Block 1 of the recorded subdivision of MK Simpson Center Division No. 1 having Inst. No. 1632904 within the Bonneville County, Idaho recorders office, thence along the Easterly boundary of said recorded subdivision the following three (3) courses; (1) leaving said North right-of-way N00°06'33"W 276.57 feet; (2) S89°52'38"W 173.00 feet (3) N00°05'53"E 341.89 feet, thence leaving said Easterly boundary N89°52'38"E 377.00 feet to the True Point of Beginning.

Above described property is subject to reservations pursuant to Instrument No. 1613813, dated July 17, 2019

Parcel contains 4.251 Acres.

EXHIBIT "B"
SPECIAL CONDITIONS

MK SIMPSON CENTER DIVISION NO. 3

S.C. 1.00 Traffic Signs. DEVELOPER agrees to install all street signs designating the names of all streets within the Subdivision. Street signs designating the name of public streets shall be constructed with white letters over green background. Street signs designating the name of private streets shall be constructed with white lettering over blue background. Such signs shall be installed in the manner and locations as directed by CITY's Engineer.

S.C. 2.00 Access to 33rd North. Access shall be in accordance with the Bonneville Metropolitan Planning Organization ("BMPO") Access Management Plan.

S.C. 3.00 MK Simpson Boulevard Landscaping. This Subdivision has access to MK Simpson Boulevard. DEVELOPER acknowledges that CITY does not maintain the landscaping within the MK Simpson Boulevard right-of-way. Landscaping responsibilities for this corridor shall be borne by the DEVELOPER, and DEVELOPER's heirs, successors, or assigns to Subdivision, within this area.

S.C. 4.00 Existing Infrastructure. When it is necessary to move or remove existing infrastructure not belonging to CITY and not within CITY right-of-way, DEVELOPER shall coordinate such activities with the applicable owner, (e.g., poles owned by Pacificorp, dba Rocky Mountain Power). Any existing electrical infrastructure owned by Pacificorp, dba Rocky Mountain Power, will require a buy-out from DEVELOPER prior to receipt of electrical service from CITY. Request for the buy-out, if any, is to be initiated by DEVELOPER after annexation.

S.C. 5.00 Construction of Idaho Falls Power and Idaho Falls Fiber Infrastructure. DEVELOPER shall, at DEVELOPER's sole expense, install all power infrastructure as described and illustrated on the Idaho Falls Power approved and signed contractor's map provided and reviewed by Idaho Falls Power. All power infrastructure installation shall conform with Idaho Falls Power's service policy. Typical power trench installation shall have a warranty of workmanship of one (1) year beginning at the time of CITY's final acceptance. However, if power infrastructure is installed during winter conditions (where frost is evident in the ground and backfill has the potential to be frozen earth) the warranty of workmanship shall be extended to two (2) full years beginning at the time of CITY's final acceptance. DEVELOPER shall incur all costs associated with Idaho Falls Power/Idaho Falls Fiber crews removing infrastructure in order to remedy settling. This includes, but is not limited to, all settlement of trenching, transformer bases, fiber boxes, and/or conduit separation.

S.C. 6.00 Storm Drainage. Storm Drainage shall be designed and constructed to accommodate drainage of the lots within the Subdivision by DEVELOPER. The storm drainage system shall meet CITY's Storm Drainage Policy. The storm system shall be constructed as shown

on the CITY-approved Improvement Drawings. Maintenance of the storm pond shall be the responsibility of DEVELOPER or DEVELOPER's heirs, successors, or assigns.

Memorandum

File #: 25-195 **City Council Meeting**

FROM: Wade Sanner, Director; on behalf of the Idaho Falls Redevelopment Agency
DATE: Friday, March 21, 2025
DEPARTMENT: Community Development Services

Subject
Legislative Hearing: Consideration of an Ordinance approving Snake River West Urban Renewal District

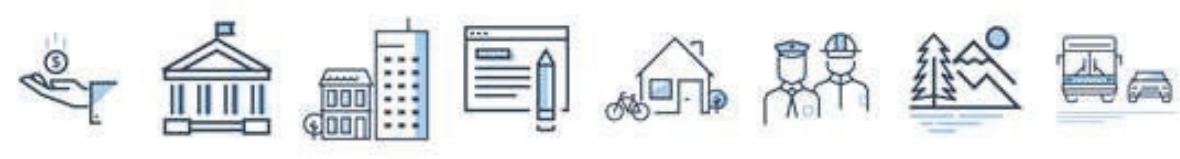
Council Action Desired
☒ Ordinance ☐ Resolution ☒ Public Hearing
☐ Other Action (Approval, Authorization, Ratification, etc.)
Approve the Ordinance approving the Snake River West Urban Renewal District under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

Description, Background Information & Purpose
Attached for consideration is the ordinance approving the Snake River West Urban Renewal District. The ordinance includes four exhibits:

1. The resolution of the Planning and Zoning Commission for the City of Idaho Falls, Idaho, validating conformity of the Urban Renewal Plan for the Yellowstone Square Urban Renewal Project with the City of Idaho Falls' Comprehensive Plan.
2. The notice of hearing published in the Post Register.
3. The Urban Renewal Plan for the Yellowstone Square Urban Renewal Project, including all associated attachments.
4. Ordinance summary for publication.

Required notification and summary of the plan has been provided to the appropriate taxing entities. The plan included with the ordinance contains an outline of potential projects which may be completed with tax incrementing financing (TIF) funds and a financial feasibility study demonstrating that the expected tax revenues can cover the costs of the projects. Approval of the ordinance is the final step in the creation of the district, which will allow for TIF to be used to incentivize and assist redevelopment of the area. The Idaho Falls Redevelopment Agency (IFRA) Board approved the plan by resolution at its November 21, 2024, meeting. This is anticipated to be a 20-year plan, the maximum allowed by State Statute.

Alignment with City & Department Planning Objectives



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The policies in the plan are consistent with many of the city's goals related to Good Governance, Growth, Sustainability, and Livable Communities.

Interdepartmental Coordination
NA

Fiscal Impact
NA

Legal Review
The City Attorney's Office has reviewed the ordinance to ensure it is in accordance with applicable law.

ORDINANCE NO. ____

AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, APPROVING THE URBAN RENEWAL PLAN FOR THE SNAKE RIVER WEST URBAN RENEWAL PROJECT, WHICH PLAN INCLUDES REVENUE ALLOCATION FINANCING PROVISIONS; AUTHORIZING THE CITY CLERK TO TRANSMIT A COPY OF THIS ORDINANCE AND OTHER REQUIRED INFORMATION TO COUNTY AND STATE OFFICIALS AND THE AFFECTED TAXING ENTITIES; PROVIDING SEVERABILITY, CODIFICATION, AND PUBLICATION BY SUMMARY; PROVIDING FOR A WAIVER OF THE READING RULES; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, on the 6th day of July 1966, the City Council and Mayor of Idaho Falls, Idaho, respectively, created the Urban Renewal Agency of the City of Idaho Falls, Idaho, also known as the Idaho Falls Redevelopment Agency (hereinafter "Agency"), authorizing it to transact business and exercise the powers granted by the Idaho Urban Renewal Law of 1965, Chapter 20, Title 50, Idaho Code, as amended (the "Law") and the Local Economic Development Act, Chapter 29, Title 50, Idaho Code, as amended (the "Act"), upon making the findings of necessity required for creating said Agency;

WHEREAS, the City Council (the "City Council") of the City of Idaho Falls, Idaho (the "City"), on October 14, 2004, after notice duly published, conducted a public hearing on the River Commons Urban Renewal Plan (the "River Commons Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 2256 on October 14, 2004, approving the River Commons Plan, making certain findings, and establishing the River Commons revenue allocation area (the "River Commons Project Area");

WHEREAS, the City Council, on December 11, 2014, after notice duly published conducted a public hearing on the Urban Renewal Plan for the Eagle Ridge Urban Renewal Project (the "Eagle Ridge Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 2978 on December 11, 2014, approving the Eagle Ridge Plan, making certain findings, and establishing the Eagle Ridge revenue allocation area (the "Eagle Ridge Project Area");

WHEREAS, the City Council, on November 9, 2017, after notice duly published conducted a public hearing on the Urban Renewal Plan for the Jackson Hole Junction Urban Renewal Project (the "Jackson Hole Junction Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 3142 on November 9, 2017, approving the Jackson Hole Junction Plan, making certain findings, and establishing the Jackson Hole Junction revenue allocation area (the "Jackson Hole Junction Project Area");

WHEREAS, the City Council, on November 10, 2022, after notice duly published conducted a public hearing on the Urban Renewal Plan for the Pancheri East Bank Urban Renewal Project ("Pancheri East Bank Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 3492 on November 10, 2022, approving the Pancheri East Bank Plan, making certain findings, and establishing the Pancheri East Bank Plan revenue allocation area (the "Pancheri East Bank Project Area");

WHEREAS, the City Council, on March 30, 2023, after notice duly published conducted a public hearing on the Urban Renewal Plan for the Anderson Bush Urban Renewal Project ("Anderson Bush Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 3508 on March 30, 2023, approving the Anderson Bush Plan, making certain findings, and establishing the Anderson Bush Plan revenue allocation area (the "Anderson Bush Project Area");

WHEREAS, the City Council, on October 26, 2023, after notice duly published conducted a public hearing on the Urban Renewal Plan for the Stanley Boge Urban Renewal Project (the "Stanley Boge Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 3548 on October 26, 2023, approving the Stanley Boge Plan, making certain findings, and establishing the Stanley Boge Plan revenue allocation area (the "Stanley Boge Project Area");

WHEREAS, the City Council, on June 13, 2024, after notice duly published conducted a public hearing on the First Amendment to the Urban Renewal Plan for the Eagle Ridge Urban Renewal Project (the "Amended Eagle Ridge Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 3575 on June 13, 2024, approving the Amended Eagle Ridge Plan to deannex approximately 8.4 acres from the existing Eagle Ridge Project Area, making certain findings, and establishing the Amended Eagle Ridge revenue allocation area (the "Amended Eagle Ridge Project Area");

WHEREAS, the City Council, on December 12, 2024, after notice duly published conducted a public hearing on the Urban Renewal Plan for the Yellowstone Square Urban Renewal Project (the "Yellowstone Square Plan");

WHEREAS, following said public hearing, the City Council adopted its Ordinance No. 3596 on December 12, 2024, approving the Yellowstone Square Plan, making certain findings, and establishing the Yellowstone Square Plan revenue allocation area (the "Yellowstone Square Project Area");

WHEREAS, the above referenced urban renewal plans are collectively referred to as the "Existing Urban Renewal Plans" and their respective revenue allocation project areas are collectively referred to as the "Existing Project Areas;"

WHEREAS, pursuant to Idaho Code Section 50-2008, an urban renewal project may not be planned or initiated unless the local governing body has, by resolution, determined such area to be a deteriorated area or deteriorating area, or combination thereof, and designated such area as appropriate for an urban renewal project;

WHEREAS, an urban renewal plan shall (a) conform to the general plan for the municipality as a whole, except as provided in Section 50-2008(g), Idaho Code; and (b) shall be sufficiently complete to indicate such land acquisition, demolition and removal of structures, redevelopment, improvements, and rehabilitation as may be proposed to be carried out in the urban renewal area, zoning and planning changes, if any, land uses, maximum densities, building requirements, and any method or methods of financing such plan, which methods may include revenue allocation financing provisions;

WHEREAS, Idaho Code Section 50-2906, also requires that in order to adopt an urban renewal plan containing a revenue allocation financing provision, the local governing body must make a finding or determination that the area included in such plan is a deteriorated area or deteriorating area;

WHEREAS, based on inquiries and information presented by certain interested parties and property owners, the Agency commenced certain discussions concerning examination of an area most of which was located within the City, and a portion of which was located within the City's area of operation within unincorporated Bonneville County, and whether it may be deteriorating and/or deteriorated and should be examined as to whether such an area is eligible for urban renewal planning purposes;

WHEREAS, on November 16, 2023, the Agency adopted Resolution No. 2023-19 approving a Memorandum of Understanding ("MOU") with U.S. Development, Inc., a Utah corporation, which inter alia required U.S. Development, Inc. to deposit certain funds to advance fund certain costs and fees related to the preparation and processing of an eligibility report, and if directed, funds related to urban renewal planning costs;

WHEREAS, U.S. Development, Inc. paid the funds as required by the MOU;

WHEREAS, the Agency engaged the services of Brad Cramer, Perspective Planning & Consulting LLC, to commence an eligibility study and preparation of an eligibility report of an area approximately 18.5 acres in size, a portion of which was located within the Eagle Ridge Project Area, requiring a deannexation. The area is

generally located west of the Snake River, east and adjacent to I-15, south of Pancheri Drive, and north of Sunnyside Road (the "Study Area");

WHEREAS, annexation of that portion of the Study Area located outside of the City limits and within unincorporated Bonneville Couty was completed; all parcels in the Study Area are located within the City limits;

WHEREAS, the Agency obtained the Eligibility Study: Snake River West (the "Report"), which examined the Study Area for the purpose of determining whether such area was a deteriorating area, a deteriorated area, or a combination of both a deteriorating area and a deteriorated area, as those terms are defined by Idaho Code Sections 50-2018(8), (9) and 50-2903(8);

WHEREAS, pursuant to Idaho Code Sections 50-2018(8), (9) and 50-2903(8), which define the qualifying conditions of a deteriorating area and deteriorated area, many of the conditions necessary to be present in such an area are found in the Study Area, including:

a. The presence of a substantial number of deteriorated or deteriorating structures; deterioration of site;
b. age or obsolescence;
c. predominance of defective or inadequate street layout;
d. outmoded street patterns;
e. lack of correlation of the area with the other areas of the City by streets and modern traffic requirements;
f. faulty lot layout in relation to size, adequacy, accessibility or usefulness/obsolete platting;
g. insanitary or unsafe conditions;
h. existence of conditions which endanger life or property by fire and other causes;
i. existence of conditions which retard development of the area; and
j. results in economic disuse or economic underdevelopment of the area;

WHEREAS, the Study Area is predominantly open space/open land;

WHEREAS, under the Act, a deteriorated area includes any area which is predominantly open and which, because of obsolete platting, diversity of ownership, deterioration of structures or improvements, or otherwise, results in economic underdevelopment of the area or substantially impairs or arrests the sound growth of a municipality. See, Idaho Code § 50-2903(8)(c);

WHEREAS, Idaho Code §§ 50-2018(9), 50-2903(8) and 50-2008(d) list the additional conditions applicable to open land areas, including open land areas to be acquired by the Agency, which are the same or similar to the conditions set forth in the definitions of "deteriorating area" and "deteriorated area";

WHEREAS, the Report addresses the findings concerning including open land within any urban renewal area as defined in Idaho Code Sections 50-2018(9), 50-2903(8)(c), and 50-2008(d);

WHEREAS, the effects of the listed conditions cited in the Report result in economic underdevelopment of the area, substantially impairs or arrests the sound growth of a municipality, constitutes an economic or social liability, and is a menace to the public health, safety, morals or welfare in its present condition or use;

WHEREAS, under the Law and Act, Idaho Code Sections 50-2903(8)(f) and 50-2018(8) and (9), the definition of a deteriorating area shall not apply to any agricultural operation as defined in section 22-4502(2), Idaho Code, absent the consent of the owner of the agricultural operation except for an agricultural operation that has not been used for three (3) consecutive years;

WHEREAS, the Study Area includes parcels subject to such consent;

WHEREAS, the Agency Board, on February 15, 2024, adopted Resolution No. 2024-01, accepting the Report and authorized the Chair, Vice-Chair, or Administrator of the Agency to transmit the Report to the City Council requesting its consideration for designation of an urban renewal area and requesting the City Council to direct the Agency to prepare an urban renewal plan for the Study Area, which plan may include a revenue allocation provision as allowed by the Act;

WHEREAS, the City Council on April 11, 2024, adopted Resolution No. 2024-06, and declared the Study Area described in the Report to be a deteriorated area or a deteriorating area, or a combination thereof, as defined by Chapters 20 and 29 of Title 50, Idaho Code, as amended, that such Study Area is appropriate for an urban renewal project, and directed the Agency to commence preparation of an urban renewal plan for the area designated;

WHEREAS, the parcels in the Study Area located within the existing Eagle Ridge Project Area were successfully de-annexed from the Eagle Ridge Project Area pursuant to City Council Ordinance No. 3575, dated June 13, 2024;

WHEREAS, in order to implement the provisions of the Act and the Law either Agency may prepare a plan, or any person, public or private, may submit such plan to the Agency;

WHEREAS, pursuant to the Law and the Act, as amended, the Agency prepared the Urban Renewal Plan for the Snake River West Urban Renewal Project (the "Snake River West Plan"), as set forth in Exhibit 3 attached hereto, and the corresponding urban renewal/revenue allocation area referred to as the Snake River West project area (the "Snake River West Project Area," the "Project Area," or "Revenue Allocation Area"), to develop and/or redevelop a portion of the City, pursuant to the Law and the Act, as amended;

WHEREAS, the Snake River West Project Area is shown on the "Boundary Map of Snake River West Urban Renewal Project Area and Revenue Allocation Area" and described in the "Legal Description of Snake River West Urban Renewal Project Area and Revenue Allocation Area," which are attached to the Snake River West Plan as Attachments 1 and 2 respectively;

WHEREAS, the Act authorizes the Agency to adopt revenue allocation financing provisions as part of an urban renewal plan;

WHEREAS, the Snake River West Plan contains revenue allocation financing provisions as allowed by the Act;

WHEREAS, the Agency reviewed and considered the proposed public improvements within the Snake River West Project Area at several meetings during 2024;

WHEREAS, the Agency Board considered all comment and information submitted to the Agency during several Board meetings in 2024, in addition to the City staff's efforts to meet with property owners in order to promote input into the Snake River West Plan;

WHEREAS, on November 21, 2024, the Agency Board adopted Resolution No. 2024-11 proposing and recommending the approval of the Snake River West Plan;

WHEREAS, the Agency submitted the Snake River West Plan to the Mayor and City Council;

WHEREAS, the Mayor and City Clerk have taken the necessary action in good faith to process the Snake River West Plan consistent with the requirements set forth in Idaho Code Sections 50-2906 and 50-2008;

WHEREAS, pursuant to the Law, at a meeting held on March 4, 2025, the Idaho Falls Planning Commission considered the Snake River West Plan and found by Planning Commission Resolution No. 01-2025 that the Snake River West Plan is in all respects in conformity with the City's Comprehensive Plan, Imagine IF, A Plan to Move Idaho Falls Forward Together, as amended (the "Comprehensive Plan") and forwarded its findings to the City Council, a copy of which is attached hereto as Exhibit 1;

WHEREAS, the notice of public hearing of the Snake River West Plan was caused to be published by the Idaho Falls City Clerk in its official newspaper the *Post Register* on February 14 and 28, 2025, a copy of said notice is attached hereto as Exhibit 2;

WHEREAS, as of February 12, 2025, the Snake River West Plan was submitted to the affected taxing entities, available to the public, and under consideration by the City Council;

WHEREAS, the City Council during its regular meeting of April 10, 2025, held such public hearing on the Snake River West Plan as noticed;

WHEREAS, as required by Idaho Code sections 50-2905 and 50-2906, the Snake River West Plan contains the following information with specificity which was made available to the general public and all affected taxing districts prior to the public hearing on March 20, 2025, the regular meeting of the City Council, at least thirty (30) days but no more than sixty (60) days prior to the date set for final reading of the Ordinance: (1) a statement describing the total assessed valuation of the base assessment roll of the revenue allocation area and the total assessed valuation of all taxable property within the municipality; (2) the kind, number, and location of all proposed public works or improvements within the revenue allocation area; (3) an economic feasibility study; (4) a detailed list of estimated project costs; (5) a fiscal impact statement showing the impact of the revenue allocation area, both until and after the bonds, notes and/or other obligations are repaid, upon all taxing districts levying taxes upon property in the revenue allocation area; (6) a description of the methods of financing all estimated project costs and the time when related costs or monetary obligations are to be incurred; (7) a termination date for the plan and the revenue allocation area as provided for in section 50-2903(20), Idaho Code. In determining the termination date, the plan shall recognize that the agency shall receive allocation of revenues in the calendar year following the last year of the revenue allocation provision described in the urban renewal plan; and (8) a description of the disposition or retention of any assets of the agency upon the termination date. Provided however, nothing herein shall prevent the agency from retaining assets or revenues generated from such assets as long as the agency shall have resources other than revenue allocation funds to operate and manage such assets;

WHEREAS, the Snake River West Plan authorizes certain projects to be financed by owner/developer participation agreements and proceeds from revenue allocation. Revenue allocation bonds or loans are permissible;

WHEREAS, appropriate notice of the Snake River West Plan and revenue allocation provision contained therein has been given to the affected taxing districts and to the public as required by Idaho Code §§ 50-2008 and 50-2906;

WHEREAS, it is necessary and in the best interest of the citizens of the City, to adopt the Snake River West Plan and to adopt, as part of the Snake River West Plan, revenue allocation financing provisions that will help finance urban renewal projects to be completed in accordance with the Snake River West Plan, in order to: (1) encourage private development in the urban renewal area; (2) to prevent and arrest decay of the Snake River West Project Area due to the inability of existing financing methods to provide needed public improvements; (3) to encourage the affected taxing districts to cooperate in the allocation of future tax revenues arising in the Snake River West Project Area in order to facilitate the long-term growth of their common tax base; (4) to encourage the long-term growth of their common tax base; (5) to encourage private investment within the City and (6) to further the public purposes of the Agency;

WHEREAS, the City Council finds that the equalized assessed valuation of the taxable property in the revenue allocation area as shown and described in Attachments 1 and 2 of the Snake River West Plan is likely to increase, and continue to increase, as a result of initiation of urban renewal projects in accordance with the Snake River West Plan;

WHEREAS, under the Law and Act any such plan should provide for (1) a feasible method for the location of families who will be displaced from the urban renewal area in decent, safe, and sanitary dwelling accommodations within their means and without undue hardship to such families; (2) the urban renewal plan should conform to the general plan of the municipality as a whole; (3) the urban renewal plan should give due consideration to the provision of adequate park and recreational areas and facilities that may be desirable for neighborhood improvement, with special consideration for the health, safety, and welfare of the children residing in the general vicinity of the site covered by the plan; and (4) the urban renewal plan should afford maximum opportunity, consistent with the sound needs of the municipality as a whole, for the rehabilitation or redevelopment of the urban renewal area by private enterprise;

WHEREAS, if the urban renewal area consists of an area of open land to be acquired by the urban renewal agency, such area shall not be so acquired unless (1) if it is to be developed for residential uses, the local governing body shall determine that a shortage of housing of sound standards and design which is decent, safe, and sanitary exists in the municipality; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe, and sanitary housing cause or contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the municipality; or (2) if it is to be developed for nonresidential uses, the local governing body shall determine that such nonresidential uses are necessary and appropriate to facilitate the proper growth and development of the community in accordance with sound planning standards and local community objectives, which acquisition may require the exercise of governmental action, as provided in the Law, because of defective or unusual conditions of title, diversity of ownership, tax delinquency, improper subdivisions, outmoded street patterns, deterioration of site, economic disuse, unsuitable topography or faulty lot layouts, the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area;

WHEREAS, the Agency obtained written consent concerning certain property owners within the Sanke River West Project Area, which may have been deemed an agricultural operation, as stated above. True and correct copies of the agricultural operation consents are included as Attachment 6 to the Snake River West Plan;

WHEREAS, the base assessment roll of the Snake River West Project Area, together with the base assessment roll values of the Existing Project Areas, cannot exceed ten percent (10%) of the current assessed values of all the taxable property in the City;

WHEREAS, it is necessary, and in the best interests of the citizens of the City to adopt the Snake River West Plan;

WHEREAS, the City Council at its regular meeting held on April 10, 2025, considered the Snake River West Plan as proposed and made certain comprehensive findings.

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS:

SECTION 1: It is hereby found and determined that:

(a) The Snake River West Project Area as defined in the Snake River West Plan is a deteriorated area or a deteriorating area as defined in the Law and the Act and qualifies as an eligible urban renewal area under the Law and Act.

(b) The rehabilitation, conservation, development and redevelopment of the urban renewal area pursuant to the Snake River West Plan are necessary in the interests of public health, safety, and welfare of the residents of the City.

(c) There continues to be a need for the Agency to function in the City.

(d) The Snake River West Plan conforms to the City's Comprehensive Plan as a whole.

(e) The Snake River West Plan gives due consideration to the provision of adequate park and recreation areas and facilities that may be desirable for neighborhood improvement recognizing the mixed-use, multi-family residential, retail, office, commercial and public components of the Snake River West Plan and the need for public improvements to support the goals of the uses of the area, and shows consideration for the health, safety, and welfare of any children, residents, or businesses in the general vicinity of the urban renewal area covered by the Snake River West Plan.

(f) The Snake River West Plan affords maximum opportunity consistent with the sound needs of the City as a whole for the rehabilitation, development, and redevelopment of the urban renewal area by private enterprises.

(g) Pursuant to Idaho Code §§ 50-2007(h) and 50-2008(d)(l), the Snake River West Plan provides a feasible method for relocation obligations of any displaced families residing within the Snake River West Project Area and there is not anticipated to be any activity by the Agency that would result in relocation.

(h) The collective base assessment rolls for the Existing Project Areas and the Snake River West Project Area, do not exceed ten percent (10%) of the assessed values of all the taxable property in the City.

(i) The Snake River West Plan includes the requirements set forth in Idaho Code § 50-2905 with specificity.

(j) The Snake River West Plan is sufficiently complete to indicate such land acquisition, demolition and removal of structures, redevelopment, improvements, and rehabilitation as may be proposed to be carried out in the urban renewal area, zoning and planning changes (if any), land uses, maximum densities, building requirements, and any method or methods of financing such plan, which methods may include revenue allocation financing provisions.

(k) The urban renewal area, which includes the deteriorating area, as defined in Idaho Code section 50-2018(9) and Idaho Code section 50-2903(8)(f), does include agricultural operations for which the Agency has received written consent, or which have not been used for agricultural purposes for three (3) consecutive years.

(l) The portion of the Snake River West Project Area which is identified for non-residential uses is necessary and appropriate to facilitate the proper growth and development standards in accordance with the objectives of the Comprehensive Plan to overcome economic disuse, the need for improved traffic patterns, and the need for the correlation of this area with other areas of the City.

(m) The portion of the Snake River West Project Area which is identified for residential uses is necessary and appropriate as there is a shortage of housing of sound standards and design which is decent, safe and sanitary in the City; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe and sanitary housing cause or contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the City.

SECTION 2: The City Council finds that the Snake River West Project Area includes open land, that the Agency may acquire any open land within the Snake River West Project Area but does not intend to do so on any widespread basis, and that the Snake River West Project Area is planned to be developed and/or redeveloped in a manner that may include residential and nonresidential uses. Provided, however, the City Council finds that for the portions of the Snake River West Project Area deemed to be "open land," the criteria set forth in the Law and Act have been met.

SECTION 3: The Snake River West Plan, a copy of which is attached hereto and marked as Exhibit 3 and made a part hereof by attachment, be, and the same hereby is approved. As directed by the City Council, the City Clerk and/or the Agency may make certain technical corrections or revisions in keeping with the information and testimony presented at the March 20, 2025, hearing and incorporate changes or modifications, if any.

SECTION 4: No direct or collateral action challenging the Snake River West Plan shall be brought prior to the effective date of this Ordinance or after the elapse of thirty (30) days from and after the effective date of this Ordinance adopting the Snake River West Plan.

SECTION 5: Upon the effective date of this Ordinance, the City Clerk is authorized and directed to transmit to the Bonneville County Auditor and Bonneville County Assessor, and to the appropriate officials of Bonneville County Board of County Commissioners, City of Idaho Falls, Bonneville County Ambulance, College of Eastern Idaho, Idaho Falls School District No. 91, Bonneville County Road and Bridge, Fire District #1, and the State Tax Commission a copy of this Ordinance, a copy of the legal description of the boundaries of the Revenue Allocation Area, and a map indicating the boundaries of the Snake River West Project Area.

SECTION 6: The City Council hereby finds and declares that the equalized assessed valuation of the Revenue Allocation Area as defined in the Snake River West Plan, is likely to increase as a result of the initiation and completion of urban renewal projects pursuant to the Snake River West Plan.

SECTION 7: The City Council hereby approves and adopts the following statement policy relating to the appointment of City Council members as members of the Agency's Board of Commissioners: If any City Council members are appointed to the Board, they are not acting in an ex officio capacity but, rather, as private citizens who, although they are also members of the City Council, are exercising their independent judgment as private citizens when they sit on the Board. Except for the powers to appoint and terminate Board members and to adopt the Snake River West Plan, the City Council recognizes that it has no power to control the powers or operations of the Agency.

SECTION 8: So long as any Agency bonds, notes or other obligations are outstanding, the City Council will not exercise its power under Idaho Code section 50-2006 to designate itself as the Agency Board.

SECTION 9: This Ordinance shall be in full force and effect immediately upon its passage, approval, and publication and shall be retroactive to January 1, 2025, to the extent permitted by the Act.

SECTION 10: The provisions of this Ordinance are severable, and if any provision of this Ordinance or the application of such provision to any person or

circumstance is declared invalid for any reason, such declaration shall not affect the validity of remaining portions of this Ordinance.

SECTION 11: The Summary of this Ordinance, a copy of which is attached hereto as Exhibit 4, is hereby approved.

SECTION 12: All ordinances, resolutions, orders or parts thereof in conflict herewith are hereby repealed, rescinded and annulled.

SECTION 13: Savings Clause. This Ordinance does not affect an action or proceeding commenced or right accrued before this Ordinance takes effect.

SECTION 14: That pursuant to the affirmative vote of one-half (1/2) plus one (1) of the Members of the full Council, the rule requiring two (2) separate readings by title and one (1) reading in full be, and the same is hereby, dispensed with, and accordingly, this Ordinance shall be in full force and effect upon its passage, approval and publication.

PASSED by the City Council of the City of Idaho Falls, Idaho, on this ____ day of March 2025.

APPROVED by the Mayor of the City of Idaho Falls, Idaho, on this _____ day of March 2025.

_____
Mayor Rebecca L. Noah Casper

ATTEST:

_____
Emily Geisler, City Clerk

Exhibit 1

Resolution of the Planning Commission for the City of Idaho Falls, Idaho, Validating Conformity of the Urban Renewal Plan for the Snake River West Urban Renewal Project with the City of Idaho Falls' Comprehensive Plan (PC Resolution 01-2025)

Exhibit 2

Notice Published in the *Post Register*

Exhibit 3

Urban Renewal Plan for the
Snake River West Urban Renewal Project

Exhibit 4

Ordinance Summary

CITY OF IDAHO FALLS

BY THE PLANNING COMMISSION

RESOLUTION OF THE PLANNING COMMISSION FOR THE CITY OF IDAHO FALLS, IDAHO, VALIDATING CONFORMITY OF THE URBAN RENEWAL PLAN FOR THE SNAKE RIVER WEST URBAN RENEWAL PROJECT WITH THE CITY OF IDAHO FALLS' COMPREHENSIVE PLAN

WHEREAS, the Urban Renewal Agency of the City of Idaho Falls, Idaho, also known as the Idaho Falls Redevelopment Agency (hereinafter "Agency"), the duly constituted and authorized urban renewal agency of the City of Idaho Falls, Idaho (the "City"), has submitted the proposed Urban Renewal Plan for the Snake River West Urban Renewal Project (the "Plan") to the City; and

WHEREAS, the Mayor and the Idaho Falls City Council referred the Plan to the City Planning Commission for review and recommendations concerning the conformity of said Plan with the City's Comprehensive Plan, Imagine IF, A Plan to Move Idaho Falls Forward Together, as amended (the "Comprehensive Plan"); and

WHEREAS, the staff of the City Planning Commission has reviewed said Plan and has determined that it is in all respects in conformity with the Comprehensive Plan; and

WHEREAS, on March 4, 2025, the City Planning Commission met to consider whether the Plan conforms with the Comprehensive Plan as required by Idaho Code § 50-2008(b); and

WHEREAS, the City Planning Commission has reviewed said Plan in view of the Comprehensive Plan; and

WHEREAS, the City Planning Commission has determined that the Plan is in all respects in conformity with the Comprehensive Plan.

NOW, THEREFORE, BE IT RESOLVED BY THE PLANNING COMMISSION FOR THE CITY OF IDAHO FALLS, IDAHO:

Section 1. That the Plan, submitted by the Agency and referred to this Commission by the Mayor and City Council for review, is in all respects in conformity with the City's Comprehensive Plan.

Section 2. That **Exhibit A**, outlining the findings supporting the determination that the Plan is in conformity with the City's Comprehensive Plan, is hereby adopted and incorporated as part of this Resolution.

Section 3. That the Chair of the Planning Commission is hereby authorized and directed to provide the Mayor and City Council with a signed copy of this Resolution relating to said Plan.

Section 4. That this Resolution shall be in full force and effect immediately upon its adoption and approval.

ADOPTED by the Planning Commission of the City of Falls, Idaho, this 4th day of March 2025.

APPROVED:	**ATTEST:**
Forrest Ihler, Vice-Chair Planning Commission	Planning Director, Planning Commission

4910-9472-1296, v. 1

ADVERTISING INVOICE

APG West Payment
Processing
PO Box 1570
Pocatello, ID 83204
Ph. (208) 542-6712

BILLING DATE:	ACCOUNT NO:
02/10/25	10553

CITY OF IDAHO FALLS
PO BOX 50220
IDAHO FALLS, ID 83405

AD #	DESCRIPTION	START	STOP	TIMES	AMOUNT
607026	NOTICE OF REGULAR ME	02/14/25	02/28/25	4	$753.20

Payments:

Date	Method	Card Type	Last 4 Digits	Check	Amount

Discount: **$0.00**
Surcharge: **$0.00**
Credits: **$0.00**

Gross:**$753.20**
Paid Amount:**$0.00**

Amount Due:**$753.20**

We Appreciate Your Business!

607026

AD# 607026AD#

NOTICE OF REGULAR MEETING AND PUBLIC HEARING BY THE CITY COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, TO CONSIDER THE URBAN RENEWAL PLAN FOR THE SNAKE RIVER WEST URBAN RENEWAL PROJECT OF THE URBAN RENEWAL AGENCY OF THE CITY OF IDAHO FALLS, IDAHO, ALSO KNOWN AS THE IDAHO FALLS REDEVELOPMENT AGENCY

NOTICE IS HEREBY GIVEN that on Thursday, March 20, 2025, at 7:30 p.m. in the City Council Chambers, City Annex Building, 680 Park Avenue, Idaho Falls, Idaho, the City Council of the City of Idaho Falls, Idaho (the "City") will hold, during its regular meeting, a public hearing to consider for adoption the proposed Urban Renewal Plan for the Snake River West Urban Renewal Project (the "Plan"), of the Urban Renewal Agency of the City of Idaho Falls, Idaho, also knows as the Idaho Falls Redevelopment Agency ("Agency"). The urban renewal and revenue allocation area boundary is coterminous and is hereinafter described. The Plan proposes that the Agency undertake urban renewal projects, including identifying public facilities for funding, pursuant to the Idaho Urban Renewal Law of 1965, Title 50, Chapter 20, Idaho Code, as amended. The Plan being considered for adoption contains a revenue allocation financing provision pursuant to the Local Economic Development Act, Title 50, Chapter 29, Idaho Code, as amended, that will cause property taxes resulting from any increase in equalized assessed valuation in excess of the equalized assessed valuation as shown on the base assessment roll as of January 1, 2025, to be allocated to the Agency for urban renewal purposes. The Agency has adopted and recommended approval of the Plan. Following the public hearing, on March 20, 2025, the City Council may also consider the ordinance readings and/or final consideration of the ordinance consistent with the City's ordinance approval process.

The general scope and objectives of the Plan are:

a. The engineering, design, installation, construction, and/or reconstruction of storm water management infrastructure to support compliance with federal, state, and local regulations for storm water discharge and to support private development;

b. The provision for participation by property owners and developers within the Project Area to achieve the objectives of this Plan;

c. The engineering, design, installation, construction, and/or reconstruction of the transportation network within the Project Area, including all streets and streetscapes within the Project Area, with a focus on enhancements to Pioneer Road and related right-of-way improvements, including pedestrian facilities, curb and gutter improvements;

d. The engineering, design, installation, construction, and/or reconstruction of sidewalks and related pedestrian facilities, curb, gutter and streetscapes throughout the Project Area, which for purposes of this Plan, the term streetscapes includes sidewalks, lighting, landscaping, benches, signage, wayfinding, bike racks, public art, and similar amenities between the curb and right-of-way line; and other public improvements, including multi-use pathways for bicycles and pedestrians;

e. The engineering, design, installation and/or construction of the Whitewater Bridge crossing the Porter Canal and the Whitewater Street Extension, including but not limited to related right-of-way improvements, including pedestrian facilities, curb and gutter improvements, and streetscapes;

f. The engineering, design, installation, construction, and/or reconstruction of utilities including but not limited to sewer system improvements and upgrades, water system improvements and upgrades; improvements to fiber optic, natural gas and power facilities;

g. The engineering, design, installation, construction, and/or reconstruction of a portion of the Battle Creek Canal to support site development;

h. The engineering, design, installation, construction, and/or reconstruction of bicycle and pedestrian amenities;

i. Removal or relocation of underground utilities;

j. The acquisition of real property for public right-of-way improvements and pedestrian facilities to encourage development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers;

k. The acquisition of real property for utility undergrounding and streetscape improvements to create development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers and for qualified developments, including economic development;

l. The disposition of real property through a competitive process in accordance with this Plan, Idaho law, including Idaho Code § 50-2011, and any disposition policies adopted by the Agency;

m. The removal of certain infrastructure for public right-of-way, pedestrian facilities, utility undergrounding and streetscape improvements to encourage and enhance transportation and mobility options, decrease underutilized parcels, to eliminate unhealthful, unsanitary, or unsafe conditions, eliminate obsolete or other uses detrimental to the public welfare or otherwise to remove or to prevent the spread of deteriorating or deteriorated conditions;

n. The management of any property acquired by and under the ownership and control of the Agency;

o. The development or redevelopment of land by private enterprise or public agencies for uses in accordance with this Plan;

p. The provision of financial and other assistance to encourage a mix of uses in the Project Area consistent with the Comprehensive Plan;

q. The rehabilitation of structures and improvements by present owners, their successors, and the Agency;

r. The preparation and assembly of adequate sites for the development and construction of facilities for uses consistent with the Comprehensive Plan;

s. In collaboration with property owners and other stakeholders, working with the City to amend zoning regulations (if necessary) and standards and guidelines as needed to support implementation of this Plan;

t. In conjunction with the City, the establishment and implementation of performance criteria to assure high site design standards and environmental quality and other design elements which provide unity and integrity to the entire Project Area, and leveraging such development to achieve public objectives and efficient use of scarce resources;

u. To the extent allowed by law, lend or invest federal funds to facilitate development and/or redevelopment;

v. The provision for relocation assistance to displaced Project Area occupants, as required by law, or within the discretion of the Agency Board for displaced businesses;

w. Other related improvements to those set forth above as further set forth in Attachment 5.

Any such land uses as described in the Plan will be in conformance with zoning for the City and the City's Comprehensive Plan, Imagine IF, A Plan to Move Idaho Falls Forward Together, as amended. Land made available will be developed by private enterprises or public agencies as authorized by law. The Plan identifies various public and private improvements which may be made within the Project Area.

The Urban Renewal Project Area and Revenue Allocation Area herein referred to is generally described as follows:

An area within the City consisting of approximately 18.469 acres in size, generally located west of the Snake River, east and adjacent to I-15, south of Pancheri Drive, and north of Sunnyside Road.

The Project Area and Revenue Allocation Area is more particularly described as follows:

A parcel of land lying in a portion of the southeast quarter of the southeast quarter, (SE¼ SE¼), of Section 23 and the southwest quarter, (SW¼), of Section 24, both areas being within Township 2 North, Range 37 East of the Boise Meridian, Bonneville County, Idaho described as follows:

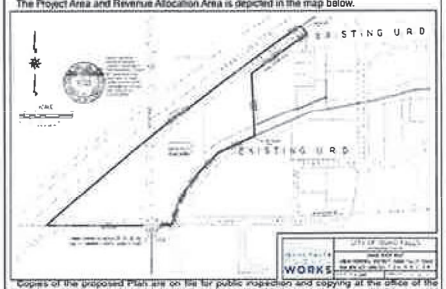
BEGINNING at the Section Corner common to Sections 23, 24, 25, and 26, Township 2 North, Range 37 East of the Boise Meridian; THENCE along the Section Line common to said Sections 23 and 26 N89°56'53"W 813.85 feet to a point on the Southeasterly Right-of-Way of Interstate 15, said point being a non-tangent curve to the RIGHT; THENCE along said Southeasterly Right-of-Way of Interstate 15 the following two (2) calls:

(1) THENCE Northeasterly along said curve to the RIGHT having a radius of 18998.59 feet, a delta angle of 07°09'17", and whose chord bears N51°43'20"E 2370.88 feet, for an arc distance of 2372.40 feet;

(2) THENCE N55°17'18"E 123.59 feet.

THENCE S34°42'42"E 80.00 feet; THENCE S55°17'18"W 123.60 feet to the point of a non-tangent curve to the LEFT; THENCE along said curve to the LEFT, having a radius of 18918.59 feet, a delta angle of 1°12'10", and whose chord bears S54°41'33"W 397.16 feet, for an arc distance of 397.17 feet; THENCE along a line non-tangent to said previous curve, S02°46'40"E, a distance of 466.89 feet; THENCE S87°05'54"W 19.48 feet; THENCE S65°27'40"W 292.01 feet; THENCE S44°52'17"W 202.51 feet; THENCE S36°59'46"W 176.80 feet; THENCE S38°51'29"W 135.46 feet; THENCE S14°55'26"W 152.34 feet to a point on the Section Line common to said Sections 24 and 25; THENCE S46°52'01"W 155.18 feet along the Section Line common to said Sections 24 and 25 to the **POINT OF BEGINNING**, and containing 18.469 acres, more or less.

The Project Area and Revenue Allocation Area is depicted in the map below.



Copies of the proposed Plan are on file for public inspection and copying at the office of the City Clerk, 308 Constitution Way, Idaho Falls, Idaho, 83405 between the hours of 8:30 a.m. and 4:00 p.m., Monday through Friday, exclusive of holidays. The Plan can also be accessed online at **https://www.idahofallsidaho.gov/620/Documents**. For additional assistance in obtaining a copy of the Plan in the event of business office interruptions, contact the office of the City Clerk at 208-612-8414.

At the hearing date, time, and place noted above (March 20, 2025, at 7:30 p.m.), all persons interested in the above matters may appear and be heard. Written testimony is encouraged. Written testimony must be submitted at least five days prior to the hearing. Oral testimony may be limited to three minutes per person. Additional information regarding attending the meeting and submitting written testimony can be obtained by calling 208-612-8414 or by email **IFClerk@idahofallsidaho.gov**.

Idaho Falls City Annex Building is accessible to persons with disabilities. All information presented in the hearing shall also be available upon advance request in a form usable by persons with hearing or visual impairments. Individuals with other disabilities may receive assistance by contacting the City twenty-four (24) hours prior to the hearing.

DATED: February 10, 2025.

Emily Geisler
City Clerk

Published: February 14, 28, 2025 (PR10553-607026)

ADVERTISING RECEIPT

APG West Payment
Processing
PO Box 1570
Pocatello, ID 83204
Ph. (208) 542-6712

BILLING DATE:	ACCOUNT NO:
03/25/25	12414

IDAHO FALLS REDEVELOPMENT AGENCY
P.O. BOX 50220
IDAHO FALLS, ID 83405

AD #	DESCRIPTION	START	STOP	TIMES	AMOUNT
620353	RESCHEDULED/CONTINUE	03/28/25	03/28/25	2	$401.36

Payments:

Date	Method	Card Type	Last 4 Digits	Check	Amount

Discount: **$0.00**
Surcharge: **$0.00**
Credits: **$0.00**

Gross:**$401.36**
Paid Amount:**$0.00**

Amount Due:**$401.36**

We Appreciate Your Business!

620353

AD# 620353AD#

RESCHEDULED/CONTINUED

NOTICE OF REGULAR MEETING AND PUBLIC HEARING BY THE CITY COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, TO CONSIDER THE URBAN RENEWAL PLAN FOR THE SNAKE RIVER WEST URBAN RENEWAL PROJECT OF THE URBAN RENEWAL AGENCY OF THE CITY OF IDAHO FALLS, IDAHO, ALSO KNOWN AS THE IDAHO FALLS REDEVELOPMENT AGENCY

NOTICE IS HEREBY GIVEN that on **Thursday, April 10, 2025, at 7:30 p.m.** in the City Council Chambers, City Annex Building, 680 Park Avenue, Idaho Falls, Idaho, the City Council of the City of Idaho Falls, Idaho (the "City") will hold, during its regular meeting, a continued public hearing to consider for adoption the proposed Urban Renewal Plan for the Snake River West Urban Renewal Project (the "Plan"), of the Urban Renewal Agency of the City of Idaho Falls, Idaho, also knows as the Idaho Falls Redevelopment Agency ("Agency"). The urban renewal and revenue allocation area boundary is coterminous and is hereinafter described. The Plan proposes that the Agency undertake urban renewal projects, including identifying public facilities for funding, pursuant to the Idaho Urban Renewal Law of 1965, Title 50, Chapter 20, Idaho Code, as amended. The Plan being considered for adoption contains a revenue allocation financing provision pursuant to the Local Economic Development Act, Title 50, Chapter 29, Idaho Code, as amended, that will cause property taxes resulting from any increase in equalized assessed valuation in excess of the equalized assessed valuation as shown on the base assessment roll as of January 1, 2025, to be allocated to the Agency for urban renewal purposes. The Agency has adopted and recommended approval of the Plan. The public hearing on March 20, 2025, was opened and is being continued from March 20, 2025, at 7:30 p.m. to April 10, 2025, at 7:30 p.m. Full Notice was published on February 14 and 28, 2025. Following the public hearing, on April 10, 2025, the City Council may also consider the ordinance readings and/or final consideration of the ordinance consistent with the City's ordinance approval process.

The general scope and objectives of the Plan are:

a. The engineering, design, installation, construction, and/or reconstruction of storm water management infrastructure to support compliance with federal, state, and local regulations for storm water discharge and to support private development;

b. The provision for participation by property owners and developers within the Project Area to achieve the objectives of this Plan;

c. The engineering, design, installation, construction, and/or reconstruction of the transportation network within the Project Area, including all streets and streetscapes within the Project Area, with a focus on enhancements to Pioneer Road and related right-of-way improvements, including pedestrian facilities, curb and gutter improvements;

d. The engineering, design, installation, construction, and/or reconstruction of sidewalks and related pedestrian facilities, curb, gutter and streetscapes throughout the Project Area, which for purposes of this Plan, the term streetscapes includes sidewalks, lighting, landscaping, benches, signage, wayfinding, bike racks, public art, and similar amenities between the curb and right-of-way line; and other public improvements, including multi-use pathways for bicycles and pedestrians;

e. The engineering, design, installation and/or construction of the Whitewater Bridge crossing the Porter Canal and the Whitewater Street Extension, including but not limited to related right-of-way improvements, including pedestrian facilities, curb and gutter improvements, and streetscapes;

f. The engineering, design, installation, construction, and/or reconstruction of utilities including but not limited to sewer system improvements and upgrades, water system improvements and upgrades; improvements to fiber optic, natural gas and power facilities;

g. The engineering, design, installation, construction, and/or reconstruction of a portion of the Battle Creek Canal to support site development;

h. The engineering, design, installation, construction, and/or reconstruction of bicycle and pedestrian amenities;

i. Removal or relocation of underground utilities;

j. The acquisition of real property for public right-of-way improvements and pedestrian facilities to encourage development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers;

k. The acquisition of real property for utility undergrounding and streetscape improvements to create development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers and for qualified developments, including economic development;

l. The disposition of real property through a competitive process in accordance with this Plan, Idaho law, including Idaho Code § 50-2011, and any disposition policies adopted by the Agency;

m. The removal of certain infrastructure for public rights-of-way, pedestrian facilities, utility undergrounding and streetscape improvements to encourage and enhance transportation and mobility options, decrease underutilized parcels, to eliminate unhealthful, unsanitary, or unsafe conditions, eliminate obsolete or other uses detrimental to the public welfare or otherwise to remove or to prevent the spread of deteriorating or deteriorated conditions;

n. The management of any property acquired by and under the ownership and control of the Agency;

o. The development or redevelopment of land by private enterprise or public agencies for uses in accordance with this Plan;

p. The provision of financial and other assistance to encourage a mix of uses in the Project Area consistent with the Comprehensive Plan;

q. The rehabilitation of structures and improvements by present owners, their successors, and the Agency;

r. The preparation and assembly of adequate sites for the development and construction of facilities for uses consistent with the Comprehensive Plan;

s. In collaboration with property owners and other stakeholders, working with the City to amend zoning regulations (if necessary) and standards and guidelines as needed to support implementation of this Plan;

t. In conjunction with the City, the establishment and implementation of performance criteria to assure high site design standards and environmental quality and other design elements which provide unity and integrity to the entire Project Area, and leveraging such development to achieve public objectives and efficient use of scarce resources;

u. To the extent allowed by law, lend or invest federal funds to facilitate development and/or redevelopment;

v. The provision for relocation assistance to displaced Project Area occupants, as required by law, or within the discretion of the Agency Board for displaced businesses;

w. Other related improvements to those set forth above as further set forth in Attachment 5.

Any such land uses as described in the Plan will be in conformance with zoning for the City and the City's Comprehensive Plan, Imagine IF, A Plan to Move Idaho Falls Forward Together, as amended. Land made available will be developed by private enterprises or public agencies as authorized by law. The Plan identifies various public and private improvements which may be made within the Project Area.

The Urban Renewal Project Area and Revenue Allocation Area herein referred to is generally described as follows:

An area within the City consisting of approximately 18.469 acres in size, generally located west of the Snake River, east and adjacent to I-15, south of Pancheri Drive, and north of Sunnyside Road.

The Project Area and Revenue Allocation Area is more particularly described as follows:

A parcel of land lying in a portion of the southeast quarter of the southeast quarter, (SE¼ SE¼), of Section 23 and the southwest quarter, (SW¼), of Section 24, both areas

being within Township 2 North, Range 37 East of the Boise Meridian, Bonneville County, Idaho described as follows:

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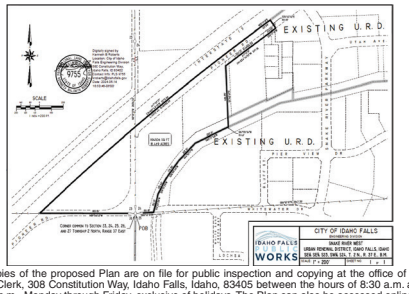

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DATED: February 10, 2025
Emily Geisler, City Clerk

Published: March 28,2025 (PR12414-123456)

URBAN RENEWAL PLAN FOR THE
SNAKE RIVER WEST URBAN RENEWAL PROJECT

THE URBAN RENEWAL AGENCY
OF THE CITY OF IDAHO FALLS, IDAHO

Ordinance No. _____
Adopted _____
Effective _____

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Attachments

Attachment 1	Boundary Map of Snake River West Urban Renewal Project Area and Revenue Allocation Area
Attachment 2	Legal Description of Snake River West Urban Renewal Project Area and Revenue Allocation Area
Attachment 3	Private Properties Which May be Acquired by the Agency
Attachment 4	Map Depicting Expected Land Use and Current Zoning Map of the Project Area
Attachment 5	Economic Feasibility Study
Attachment 6	Agricultural Operation Consents

100 INTRODUCTION

This is the Urban Renewal Plan (the "Plan") for the Snake River West Urban Renewal Project (the "Project") in the City of Idaho Falls (the "City"), State of Idaho. Attachments 1 through 6 attached hereto (collectively, the "Plan Attachments") are incorporated herein and shall be considered a part of this Plan.

The term "Project" is used herein to describe the overall activities defined in this Plan and conforms to the statutory definition of an urban renewal project. Reference is specifically made to Idaho Code §§ 50-2018(10) and 50-2903(13) for the various activities contemplated by the term "Project." Such activities include both private and public development of property within the urban renewal area. The Snake River West Project Area is also referred to as the "Project Area" or the "Revenue Allocation Area."

This Plan was prepared by the Board of Commissioners (the "Agency Board") of the Urban Renewal Agency of the City of Idaho Falls (the "Agency"), its consultants, and staff, and reviewed and recommended by the Agency pursuant to the Idaho Urban Renewal Law of 1965, Chapter 20, Title 50, Idaho Code, as amended (the "Law"), the Local Economic Development Act, Chapter 29, Title 50, Idaho Code, as amended (the "Act"), and all applicable local laws and ordinances.

Idaho Code § 50-2905 identifies what information the Plan must include with specificity as follows:

(1) A statement describing the total assessed valuation of the base assessment roll of the revenue allocation area and the total assessed valuation of all taxable property within the municipality.

(2) A statement listing the kind, number, and location of all proposed public works or improvements within the revenue allocation area.

(3) An economic feasibility study.

(4) A detailed list of estimated project costs.

(5) A fiscal impact statement showing the impact of the revenue allocation area, both until and after the bonds are repaid, upon all taxing districts levying taxes upon property on the revenue allocation area.

(6) A description of the methods of financing all estimated project costs and the time when related costs or monetary obligations are to be incurred;

(7) A termination date for the plan and the revenue allocation area as provided for in section 50-2903(20), Idaho Code. In determining the termination date, the plan shall recognize that the agency shall receive allocation of revenues in the calendar

year following the last year of the revenue allocation provision described in the urban renewal plan.

(8) A description of the disposition or retention of any assets of the agency upon the termination date. Provided however, nothing herein shall prevent the agency from retaining assets or revenues generated from such assets as long as the agency shall have resources other than revenue allocation funds to operate and manage such assets.

This Plan includes the above information with specificity.

The proposed development and redevelopment of the Project Area as described in this Plan conforms to the Idaho Falls Comprehensive Plan, *Imagine IF,* (the "Comprehensive Plan"), adopted by the Idaho Falls City Council (the "City Council") on February 24, 2022. The Agency intends to rely heavily on any applicable City zoning and design standards which may cover all or part of the Project Area.

This Plan is subject to the Plan modification limitations and reporting requirements set forth in Idaho Code § 50-2903A. Subject to limited exceptions as set forth in Idaho Code § 50-2903A, if this Plan is modified by City Council ordinance, then the base value for the year immediately following the year in which modification occurs shall include the current year's equalized assessed value of the taxable property in the revenue allocation area, effectively eliminating the Agency's revenue stream from this Project Area.

A modification shall not be deemed to occur when "[t]here is a plan amendment to make technical or ministerial changes to a plan that does not involve an increase in the use of revenues allocated to the agency." Idaho Code § 50-2903A(1)(a)(i). Annual adjustments, as more specifically set forth in the Agency's annual budget, will be required to account for more/less estimated revenue and project timing, including prioritization of projects and actual project costs. Any adjustments for these stated purposes are technical and ministerial and are not modifications under Idaho Code § 50-2903A.

Further, a modification shall not be deemed to occur when "[t]here is a plan amendment to support growth of an existing commercial or industrial project in an existing revenue allocation area, subject to the provisions of section 50-2905A, Idaho Code." Idaho Code § 50-2903A(1)(a)(iv). The Project includes the development and/or redevelopment of industrial and/or commercial projects.

This Plan provides the Agency with powers, duties, and obligations to implement and further the program generally formulated in this Plan for the development, redevelopment, rehabilitation, and revitalization of the area within the boundaries of the Project Area. The Agency retains all powers allowed by the Law and Act. This Plan presents a process and a basic framework within which plan implementation, including contracts, agreements and ancillary documents will be presented and by which tools are provided to the Agency to fashion, develop, and proceed with plan implementation. The Plan has balanced the need for flexibility over the

twenty (20)-year timeframe of the Plan to implement the improvements identified in Attachment 5, with the need for specificity as required by Idaho Code § 50-2905. The Plan narrative addresses the required elements of a plan set forth in Idaho Code § 50-2905(1), (2), (5), (7) and (8). Attachment 5, together with the Plan narrative, meet the specificity requirement for the required plan elements set forth in Idaho Code § 50-2905(1)-(6), recognizing that actual Agency expenditures are prioritized each fiscal year during the required annual budgeting process.

Allowed projects are those activities which comply with the Law and the Act and meet the overall objectives of this Plan. The public-private relationship is crucial in the successful development and redevelopment of the Project Area. Typically, the public will fund enhanced public improvements like utilities, streets, and sidewalks which, in turn, create an attractive setting for adjacent private investment. In this case, pursuant to the City's zoning and Future Land Use Map, development within the Project Area will be focused on mixed-use, multi-family residential, retail, office and commercial projects.

The purpose of the Law and Act will be attained through the implementation of the Plan. The master goals of this Plan are:

a. To support the planning, design, and construction of public infrastructure and improvements to support mixed-use, multi-family residential, retail, office and commercial development opportunities;

b. The planning, design and construction of certain public improvements, including roadway improvements to Pioneer Road, and improvements to the adjacent right-of-way to install and/or enhance curb, gutter and sidewalk, and enhanced streetscape improvements, which for purposes of this Plan, the term "streetscapes" includes sidewalks, lighting, landscaping, benches, bike racks, wayfinding, public art and similar amenities between the curb and right of way line; construction of new rights-of-way and associated streetscape improvements throughout the Project Area; improvement to existing rights-of-way and streetscapes throughout the Project Area; improvements and enhancement to bicycle and pedestrian amenities; improvements to Battle Creek Canal to support enhanced site development opportunities; planning, design and construction of the Whitewater Bridge crossing the Porter Canal and the Whitewater Street extension, including storm drainage improvements and streetscapes; planning, design and construction of related utility improvements, including improvements to the sewer system and the water system; installation and improvements to fiber optic, natural gas and power facilities;

c. The replanning, redesign, and redevelopment of underdeveloped areas which are stagnant or improperly utilized because of site deterioration, vacant parcels, and current utilization;

d. The strengthening of the economic base of the Project Area and the community by the installation of needed public improvements to stimulate new private

development providing for mixed-use, multi-family residential, retail, office and commercial opportunities.

e. The provision of adequate land for street rights-of-way and pedestrian rights-of-way, including sidewalks;

f. In conjunction with the City, the establishment and implementation of performance criteria to assure high site design standards and environmental quality and other design elements for the Project Area, and leveraging such development to achieve public objectives and efficient use of scarce resources;

g. The strengthening of the tax base by encouraging private development, thus increasing the assessed valuation of properties within the Project Area as a whole and benefiting the various taxing districts in which the urban renewal area is located;

h. The acquisition of real property to support development and/or redevelopment initiatives consistent with the Law and Act; and

i. The funding of necessary public infrastructure to accommodate both public and private development.

101 General Procedures of the Agency

The Agency is a public body, corporate and politic, as defined and described under the Law and the Act. Under the law, the Agency is governed by the Idaho open meeting law; the Public Records Act; the Ethics in Government Act of 2015, Chapters 1, 2 and 4 of Title 74, Idaho Code; reporting requirements pursuant to Idaho Code §§ 67-450B, 67-1076, 50-2903A and 50-2913; and the competitive bidding requirements under Chapter 28, Title 67, Idaho Code, as well as other procurement or other public improvement delivery methods. The Agency is also governed by its bylaws as authorized by the Law and adopted by the Agency.

Subject to limited exceptions, the Agency shall conduct all meetings in open session and allow meaningful public input as mandated by the issue considered or by any statutory or regulatory provision.

The Agency may adopt separate policy statements. Any modification to any policy statement is a technical or ministerial adjustment and is not a modification to this Plan under Idaho Code § 50-2903A.

102 Provisions Necessary to Meet State and Local Requirements: Conformance with Idaho Code Sections 50-2008 and 50-2906

Idaho law requires that the City Council, by resolution, must determine a geographic area be a deteriorated area or a deteriorating area, or a combination thereof, and designate such area

as appropriate for an urban renewal project prior to preparation of an urban renewal plan. A consultant was retained to study a proposed project area (the "Study Area") and prepare an eligibility report. The Eligibility Report: Snake River West (the "Report"), was submitted to the Agency. The Agency accepted the Report by Agency Resolution No. 2024-01 on February 15, 2024, and thereafter submitted the Report to the City Council for its consideration.

The Study Area was deemed by the City Council to be a deteriorating area and/or a deteriorated area and therefore eligible for an urban renewal project by adoption of Resolution No. 2024-06 on April 11, 2024. With the adoption of Resolution No. 2024-06, the City Council declared the Study Area described in the Report to be a deteriorated area and/or a deteriorating area as defined by Chapters 20 and 29, Title 50, Idaho Code, as amended, that such area is appropriate for an urban renewal project and directed the Agency to commence preparation of an urban renewal plan.

Under the Law and Act, Idaho Code Sections 50-2903(8)(f) and 50-2018(8) and (9), the definition of a deteriorating area shall not apply to any agricultural operation as defined in section 22-4502(2), Idaho Code, absent the consent of the owner of the agricultural operation except for an agricultural operation that has not been used for three (3) consecutive years.

In accordance with the Law and Act, the necessary agricultural operation consents were obtained from the owners of the agricultural operation within the Project Area for property that has been used as an agricultural operation within the last three (3) years. Copies of the agricultural operation consents are attached hereto as Attachment 6.

The Plan was prepared and submitted to the Agency for its review and approval. The Agency approved the Plan by the adoption of Agency Resolution No. 2024-11 on November 21, 2024, and submitted the Plan to the City Council with its recommendation for adoption.

In accordance with the Law, this Plan was submitted to the Planning Commission of the City. After consideration of the Plan, the Commission, by resolution, reported to the City Council that this Plan is in conformity with the City's Comprehensive Plan.

Pursuant to the Law and Act, the City Council having published due notice thereof, a public hearing was held on this Plan. Notice of the hearing was duly published in *Post Register*, a newspaper having general circulation in the City. The City Council adopted this Plan on _____, by Ordinance No. _____.

103 History and Current Conditions of the Area

This Project Area includes an estimated 18.469 acres and is generally located west of the Snake River, east and adjacent to I-15, south of Pancheri Drive, and north of Sunnyside Road. The Project Area is located entirely within the City limits and is within a developed portion of the City.

The Project Area is zoned Central Commercial. Current land use in the Project Area is vacant former agricultural land and single-family residential uses. The entire Project Area has been annexed into the City. The future land use map in the Comprehensive Plan envisions the Project Area as Mixed-Use Centers and Corridors, which contemplates an area where people want to shop, eat and gather, which amenities would include mixed-use buildings and commercial uses to support neighborhood connectivity. These areas include all housing types but contemplate greater housing density overall.

The area surrounding the Project Area has seen significant redevelopment: to the east is Snake River Landing, a mixed-use development; to the south is the recently completed Mountain America Center, an event venue, which is capable of hosting large events from sporting events to trade shows; and to the northeast is a hotel and several multi-family housing projects that are currently under construction. No development has occurred in the Project Area; there are significant and expensive impediments to development slowing the potential for mixed-use, multi-family residential, retail, office and commercial opportunities within the Project Area, including, but not limited to the limited street network within the Project Area; Pioneer Road is inadequate to meet growing traffic needs and lacks curb, gutter sidewalks and street lighting; the "S" curve in Pioneer Road creates safety concerns for vehicles and pedestrians as well as limiting redevelopment of a portion of the Project Area; flooding risks and ponding on the roadway; the lack of connectivity of the Project Area with the area to the east, which requires a bridge and road extension across the Porter Canal; the lack of a utility network within the Project Area to support desired development; and the location of the Battle Creek Canal, which limits the ability to develop the southern portion of the lot .

The Report cites a number of deteriorating conditions, as outlined in the Law and the Act, existing within the Project Area, including the presence of a substantial number of deteriorating or deteriorated structures; deterioration of site; age or obsolescence; predominance of defective or inadequate street layout; outmoded street patterns; lack of correlation of the area with other areas of the City by streets and modern traffic requirements; faulty lot layout in relationship to size, adequacy, accessibility, or usefulness/obsolete platting; insanitary or unsafe conditions; existence of conditions which endanger life or property by fire and other causes; and conditions which retard development of the area. The foregoing conditions result in economic underdevelopment of the area, substantially impair or arrest the sound growth of the municipality, and constitute an economic or social liability. The lack of public infrastructure in the Project Area does not support the mixed-use, multi-family residential, retail, office and commercial uses within the Project Area as identified in the Future Land Use Map and the City's Comprehensive Plan. As a result, development potential within the Project Area is currently restricted and would not meet the planning goals for a significant mixed-use, multi-family residential, retail, office and commercial area in the foreseeable future without tools to support the City's planning goals. There is a strong need for sewer and water system improvements; as well as roadway improvements, particularly on Pioneer Road, including curb, gutter, sidewalk, and streetscape improvements, as well as construction of the Whitewater bridge and the Whitewater Road extension. Improvements to the Battle Creek Canal would also assist with spurring development. At this time, the Project Area lacks the public infrastructure necessary to

properly serve the proposed uses and the economic development goals as contemplated by the City's Comprehensive Plan.

The Plan proposes remediation to certain impediments to development, as set forth in Attachment 5, with developer to advance fund certain improvements which may be eligible for reimbursement, including: Pioneer Road improvements, including right-of-way and streetscape enhancements, such as landscaping and widened sidewalks; storm drainage improvements; utility improvements, including construction of sewer and water system improvements, as well as improvements to fiber optic, natural gas and power facilities; improvements to the Battle Creek Canal; the installation and construction of the Whitewater Bridge and the Whitewater Street extension, together with right-of-way and streetscape enhancements. The Plan also proposes certain improvements to publicly owned assets within the Project Area to be undertaken and/or financed by the Agency, or other public entities, subject to annual budgeting and appropriation including, the planning, design and construction of roadway improvements, including improvements to the right-of-way and enhanced streetscape improvements,; storm drainage improvements, improvements to pedestrian and bicycle amenities, and other similar public infrastructure improvements, as necessary, creating the framework for the development of mixed-use, multi-family residential, retail, office and commercial projects consistent with the City's Comprehensive Plan.

A portion of the Project Area is underdeveloped and/or vacant and is not being used to its highest and best use due to the existence of significant impediments to development. The conditions outlined above have resulted in economic underdevelopment of the Project Area and have substantially impaired or arrested the sound growth of the City, constituted an economic and social liability and are a menace to the public health, safety, morals or welfare in its present condition and use.

The preparation and approval of an urban renewal plan, including a revenue allocation financing provision, gives the City additional resources to solve the public infrastructure and development impediment issues in this area. Revenue allocation financing should help to improve the situation. In effect, property taxes generated by new developments within the Project Area may be used by the Agency to finance a variety of needed public improvements and facilities.

It is highly unlikely that individual developers will take on the prohibitive costs of constructing the necessary infrastructure, particularly on the remaining vacant parcels in the Project Area, without the ability of revenue allocation to help offset at least some of these significant capital infrastructure costs. But for urban renewal and revenue allocation financing, the proposed removal of impediments to development and the public improvements to support revitalization and new developments supporting mixed-use, multi-family residential, retail, office and commercial uses within the Project Area would not occur.

104 Purpose of Activities

Attachment 5 includes the public improvements and projects list identifying with specificity the proposed public improvements and projects contemplated in the Project Area. Attachment 5 also identifies additional public improvement projects that may be undertaken by the Agency and/or another public entity. The description of activities, public improvements/projects, and the estimated costs of those items are intended to create an outside limit of the Agency's activity. Due to the inherent difficulty in projecting future levy rates, future taxable value, and the future costs of construction, the Agency reserves the right to:

a. change funding amounts from one Project to another.

b. Re-prioritize the Project described in this Plan and the Plan Attachments.

c. Retain flexibility in funding the various activities in order to best meet the Plan and the needs of the Project Area.

d. Retain flexibility in determining whether to use the Agency's funds or funds generated by other sources.

e. Alter the location of proposed improvements set forth in Attachment 5 to support development when it occurs. The information included in Attachment 5 is based on information obtained from property owners and City staff, however, it is difficult to project with any certainty where the improvements will be sited until any future projects submit plans to the City for design review and permitting.

The Agency intends to discuss and negotiate with any owner or developer of the parcels within the Project Area seeking Agency assistance during the duration of the Plan and Project Area. During such negotiation, the Agency will determine the eligibility of the activities sought for Agency funding, the amount the Agency may fund by way of percentage or other criteria including the need for such assistance. The Agency will also take into account the amount of revenue allocation proceeds estimated to be generated from the developer's activities. The Agency also reserves the right to establish, by way of policy, its funding percentage or participation, which would apply to all developers and owners and may prioritize the projects or types of projects as development occurs.

Throughout this Plan, there are references to Agency activities, Agency funding, and the acquisition, development, and contribution of public improvements. Such references do not necessarily constitute a full, final, and formal commitment by the Agency but, rather, grant to the Agency the discretion to participate as stated subject to achieving the objectives of this Plan and provided such activity is deemed eligible under the Law and the Act. The activities listed in Attachment 5 will be determined or prioritized as the overall Project Area develops and through the annual budget setting process.

The activities listed in Attachment 5 are not prioritized but are anticipated to be completed as determined by development and available funds. As required by the Law and Act, the Agency will adopt more specific budgets annually. The projected timing of funding is primarily a function of market conditions and the availability of financial resources but is also strategic, considering the timing of private development partnership opportunities and the ability of certain strategic activities to stimulate development at given points in time within the planned duration of the urban renewal district and revenue allocation area.

The Study (Attachment 5) has described a list of projects, public improvements, and other related activities anticipated to be undertaken by property owners/developers and reimbursed with revenue allocation proceeds with an estimated cost of approximately $5,551,594, plus the potential for an estimated $1,800,000 for additional public infrastructure projects, which could be undertaken by the Agency and/or other public entities. These amounts do not take into account inflationary factors, such as increasing construction costs, which would increase the cost figures depending on when the owner, developer and/or Agency are able to develop, construct or initiate those activities. The Study has concluded the capacity of revenue allocation funds through the term of the Plan based on the assumed development projects and assessed value increases will likely generate an estimated $8,218,292.11 in revenue allocation proceeds. The Agency reserves the discretion and flexibility to use revenue allocation proceeds in excess of the amounts predicted in the event higher increases in assessed values occur during the term of the Plan for the improvements and activities identified in Attachment 5[1]. Additionally, the Agency reserves the discretion and flexibility to use other sources of funds unrelated to revenue allocation to assist in the funding of the improvements and activities identified in any of the project lists.

105 Open Land Criteria

This Plan does not contemplate widespread Agency acquisition of real property within the Project Area. To the extent Agency acquisition of real property occurs, it will be, in part, to support economic development and housing. The Project Area is predominantly open, and therefore, the conditions set forth in Idaho Code Section 50-2903(8)(c) must be met. Idaho Code Section 50-2903(8)(c) states: "[a]ny area which is predominately open and which because of obsolete platting, diversity of ownership, deterioration of structures or improvements, or otherwise, results in economic underdevelopment of the area or substantially impairs or arrests the sound growth of a municipality. The provisions of section 50-2008(d), Idaho Code, shall apply to open areas."

The eligibility criteria set forth in Idaho Code Section 50-2903(8)(c) for predominantly open land areas mirror or are the same as those criteria set forth in Idaho Code Sections 50-2018(9) and 50-2903(8)(b). "Diversity of ownership" is the same, while "obsolete platting" appears to be equivalent to "faulty lot layout in relation to size, adequacy, accessibility, or

[1] There is potential for additional development in the Project Area within the duration of the Plan. For purposes of Attachment 5, an alternative development scenario was proposed including a 140-unit hotel, which resulted in an additional $1,000,000 for potential additional public infrastructure improvements as further set forth in Attachment 5.

usefulness." "Deterioration of structures or improvements" is the same or similar to "a substantial number of deteriorated or deteriorating structures" and "deterioration of site or other improvements." There is also an additional qualification that the provisions of Idaho Code Section 50-2008(d) shall apply to open areas.

Idaho Code Section 50-2008 primarily addresses the urban renewal plan approval process and Idaho Code Section 50-2008(d)(4) sets forth certain conditions and findings for agency acquisition of open land. In sum, there is one set of findings if the area of open land is to be acquired and developed for residential uses and a separate set of findings if the land is to be acquired and developed for nonresidential uses.

Open land areas qualify for Agency acquisition and development for residential uses if the City Council determines there is a shortage of housing of sound standards and design which is decent, safe and sanitary in the City, that the need for housing will be increased as a result of the clearance of deteriorated areas, that the conditions of blight in the area and the shortage of decent, safe and sanitary housing contributes to an increase in the spread of disease and crime and constitutes a menace to the public health, safety, morals, or welfare, and that the acquisition of the area for residential uses is an integral part of and essential to the program of the City. Due to the City's expected growth, the need for housing, including affordable and/or workforce housing, is significant and integral to a successful mixed-use Project Area. Further, the existing zoning designations in the Project Area allow for mixed-density residential, and the future land use map shows areas of projected increased residential density.

Open land areas qualify for Agency acquisition and development for nonresidential uses if the City Council determines that such nonresidential uses are necessary and appropriate to facilitate the proper growth and development of the community in accordance with sound planning standards and local community objectives, which acquisition may require the exercise of governmental action, because of defective or usual conditions of title, diversity of ownership, tax delinquency, improper subdivisions, outmoded street patterns, deterioration of site, economic disuse, unsuitable topography or faulty lot layouts, the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area. All the stated conditions are included in one form or another in the definition of a deteriorated area and/or a deteriorating area set forth in Idaho Code Sections 50-2903(8)(b) and 50-2018(9). The conditions listed only in Section 50-2008(d)(4)(2) (the open land section) include economic disuse, unsuitable topography, and "the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area."

The conclusion of this discussion concerning open land areas is that the area qualifies if any of the eligibility conditions set forth in Idaho Code Sections 50-2018(9) and 50-2903(8)(b) apply. Alternatively, the area under consideration qualifies if any of the conditions listed only in Idaho Code Section 50-2008(d)(4)(2) apply.

The following conditions are found in the Project Area, and have delayed or impaired

development of the open land areas and satisfy the open land conditions as more fully supported by the Eligibility Report: Snake River West, prepared by Brad Cramer, Perspective Planning & Consulting LLC: the presence of a substantial number of deteriorating or deteriorated structures; deterioration of site; age or obsolescence; predominance of defective or inadequate street layout; outmoded street patterns; lack of correlation of the area with other areas of the City by streets and modern traffic requirements; faulty lot layout in relationship to size, adequacy, accessibility, or usefulness/obsolete platting; insanitary or unsafe conditions; existence of conditions which endanger life or property by fire and other causes; substantially impairs or arrests the sound growth the municipality; conditions which retard development of the area; and the foregoing results in economic underdevelopment of the area and economic disuse.

This Plan does not anticipate widespread Agency acquisition of real property within the Project Area; however, should the Agency determine the need to acquire property as further set forth in Attachment 3, then the open land areas qualify for Agency acquisition and development.

200 DESCRIPTION OF PROJECT AREA

The boundaries of the Project Area and the Revenue Allocation Area are shown on the Boundary Map of Snake River West Urban Renewal Project Area and Revenue Allocation Area, attached hereto as Attachment 1 and incorporated herein by reference, and are described in the Legal Description of Snake River West Urban Renewal Project Area and Revenue Allocation Area, attached hereto as Attachment 2 and incorporated herein by reference. For purposes of boundary descriptions and use of proceeds for payment of improvements, the boundary shall be deemed to extend to the outer boundary of rights-of-way or other natural boundary unless otherwise stated.

300 PROPOSED REDEVELOPMENT ACTIONS

301 General

The Agency proposes to eliminate and prevent the spread of deteriorating conditions and deterioration in the Project Area by employing a strategy to improve and develop public and private lands, to increase connectivity, and to grow the economy in the Project Area. Implementation of the strategy includes, but is not limited to the following actions:

a. The engineering, design, installation, construction, and/or reconstruction of storm water management infrastructure to support compliance with federal, state, and local regulations for storm water discharge and to support private development;

b. The provision for participation by property owners and developers within the Project Area to achieve the objectives of this Plan;

c. The engineering, design, installation, construction, and/or reconstruction of the transportation network within the Project Area, including all streets and

streetscapes within the Project Area, with a focus on enhancements to Pioneer Road and related right-of-way improvements, including pedestrian facilities, curb and gutter improvements;

d. The engineering, design, installation, construction, and/or reconstruction of sidewalks and related pedestrian facilities, curb, gutter and streetscapes throughout the Project Area, which for purposes of this Plan, the term streetscapes includes sidewalks, lighting, landscaping, benches, signage, wayfinding, bike racks, public art, and similar amenities between the curb and right-of-way line; and other public improvements, including multi-use pathways for bicycles and pedestrians;

e. The engineering, design, installation and/or construction of the Whitewater Bridge crossing the Porter Canal and the Whitewater Street Extension, including but not limited to related right-of-way improvements, including pedestrian facilities, curb and gutter improvements, and streetscapes;

f. The engineering, design, installation, construction, and/or reconstruction of utilities including but not limited to sewer system improvements and upgrades, water system improvements and upgrades; improvements to fiber optic, natural gas and power facilities;

g. The engineering, design, installation, construction, and/or reconstruction of a portion of the Battle Creek Canal to support site development;

h. The engineering, design, installation, construction, and/or reconstruction of bicycle and pedestrian amenities;

i. Removal or relocation of underground utilities;

j. The acquisition of real property for public right-of-way improvements and pedestrian facilities to encourage development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers;

k. The acquisition of real property for utility undergrounding and streetscape improvements to create development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers and for qualified developments, including economic development;

l. The disposition of real property through a competitive process in accordance with this Plan, Idaho law, including Idaho Code § 50-2011, and any disposition policies adopted by the Agency;

m. The removal of certain infrastructure for public rights-of-way, pedestrian facilities, utility undergrounding and streetscape improvements to encourage and

enhance transportation and mobility options, decrease underutilized parcels, to eliminate unhealthful, unsanitary, or unsafe conditions, eliminate obsolete or other uses detrimental to the public welfare or otherwise to remove or to prevent the spread of deteriorating or deteriorated conditions;

n. The management of any property acquired by and under the ownership and control of the Agency;

o. The development or redevelopment of land by private enterprise or public agencies for uses in accordance with this Plan;

p. The provision of financial and other assistance to encourage a mix of uses in the Project Area consistent with the Comprehensive Plan;

q. The rehabilitation of structures and improvements by present owners, their successors, and the Agency;

r. The preparation and assembly of adequate sites for the development and construction of facilities for uses consistent with the Comprehensive Plan;

s. In collaboration with property owners and other stakeholders, working with the City to amend zoning regulations (if necessary) and standards and guidelines as needed to support implementation of this Plan;

t. In conjunction with the City, the establishment and implementation of performance criteria to assure high site design standards and environmental quality and other design elements which provide unity and integrity to the entire Project Area, and leveraging such development to achieve public objectives and efficient use of scarce resources;

u. To the extent allowed by law, lend or invest federal funds to facilitate development and/or redevelopment;

v. The provision for relocation assistance to displaced Project Area occupants, as required by law, or within the discretion of the Agency Board for displaced businesses;

w. Other related improvements to those set forth above as further set forth in Attachment 5.

In the accomplishment of these purposes and activities and in the implementation and furtherance of this Plan, the Agency is authorized to use all the powers provided in this Plan and all the powers now or hereafter permitted by Law and Act.

302 Urban Renewal Plan Objectives

Urban renewal activity is necessary in the Project Area to combat problems of physical deterioration or deteriorating conditions. As set forth in greater detail in Section 103, the Project Area has a history of stagnant growth and underdevelopment based on certain impediments to development and the existence of deteriorated or deteriorating conditions that have arrested or impaired growth in the Project Area primarily attributed to: presence of a substantial number of deteriorating or deteriorated structures; deterioration of site; age or obsolescence; predominance of defective or inadequate street layout; outmoded street patterns; lack of correlation of the area with other areas of the City by streets and modern traffic requirements; faulty lot layout in relationship to size, adequacy, accessibility, or usefulness/obsolete platting; insanitary or unsafe conditions; existence of conditions which endanger life or property by fire and other causes; and conditions which retard development of the area; and economic disuse/underdevelopment. The foregoing conditions substantially impair or arrest the sound growth of the municipality. The Plan for the Project Area is a proposal to work in partnership with public and private entities to improve, develop, and grow the economy within the Project Area by the implementation of a strategy and program set forth in Section 301 and in Attachment 5.

The provisions of this Plan are applicable to all public and private property in the Project Area. The provisions of the Plan shall be interpreted and applied as objectives and goals, recognizing the need for flexibility in interpretation and implementation, while at the same time not in any way abdicating the rights and privileges of the property owners which are vested in the present and future zoning classifications of the properties. All development under an owner participation agreement shall conform to those standards specified in Section 303.1 of this Plan.

This Plan must be practical in order to succeed. Particular attention has been paid to how it can be implemented, given the changing nature of market conditions. Transforming the Project Area into a vital, thriving part of the community requires an assertive strategy. The following list represents the key elements of that effort:

a. Initiate simultaneous projects designed to revitalize the Project Area. From street and utility improvements to significant new private development creating housing density, the Agency plays a key role in creating the necessary momentum to get and keep things going.

b. Support development that enhances the transportation network and connectivity with other areas of the City.

c. Support pedestrian and bicyclist experiences in support of the City's "Connecting our Communities" plan.

d. Support the development of uses consistent with the City's Comprehensive Plan, including mixed-use, multi-family residential, retail, office and commercial development that supports the City's economic development and housing goals.

Without direct public intervention, much of the Project Area could conceivably remain unchanged and in a deteriorated and/or deteriorating condition for the next twenty (20) years. The Plan creates the necessary flexible framework for the Project Area to support the City's development objectives while complying with the "specificity" requirement set forth in Idaho Code § 50-2905.

Land use in the Project Area may be modified to the extent that underutilized, underdeveloped, deteriorated, deteriorating and vacant land and land now devoted to uses inconsistent with the future land uses of the area will be converted to mixed-use, multi-family residential, retail, office and commercial uses consistent with the Comprehensive Plan, which is currently zoned Central Commercial, and envisioned as Mixed-Use Centers and Corridors in the Comprehensive Plan. In implementing the activities described in this Plan, the Agency, in recognizing the mixed-use, multi-family residential, retail, office and commercial uses within the Project Area, shall give due consideration to the provision of adequate open space, park and recreational areas and facilities that may be desirable for neighborhood improvement, with special consideration for the health, safety, and welfare of residents in the general vicinity of the Project Area covered by the Plan.

303 Participation Opportunities and Agreement

303.1 Participation Agreements

The Agency shall enter into various development participation agreements with any existing or future owner of property in the Project Area, in the event the property owner seeks and/or receives assistance from the Agency in the development and/or redevelopment of the property. The term "owner participation agreement" or "participation agreement" is intended to include all participation agreements with a property owner, including reimbursement agreements, grant agreements or other forms of participation agreements. In that event, the Agency may allow for an existing or future owner of property to remove the property and/or structure from future Agency acquisition subject to entering into an owner participation agreement. The Agency may also enter into owner participation agreements with other future owners and developers within the Project Area throughout the duration of this Plan in order to implement the infrastructure improvements set forth in this Plan.

Each structure and building in the Project Area to be rehabilitated or to be constructed as a condition of the owner participation agreement between the Agency and the owner pursuant to this Plan will be considered to be satisfactorily rehabilitated and constructed pursuant to the requirements of the Law and Act, and the Agency will so certify, if the rehabilitated or new structure meets the standards set forth in an executed owner participation agreement and complies with applicable provisions of this Plan, local codes and ordinances, the Idaho Code and meets the conditions described below:

a. Any such property within the Project Area shall be required to conform to all applicable provisions, requirements, and regulations of this Plan. The owner participation agreement may require as a condition of financial participation by

the Agency a commitment by the property owner to meet the greater objectives of the land use elements identified in the Comprehensive Plan, and applicable zoning ordinances, and other requirements deemed appropriate and necessary by the Agency. Upon completion of any rehabilitation each structure must be safe and sound in all physical respects and be refurbished and altered to bring the property to an upgraded marketable condition that will continue throughout an estimated useful life for a minimum of twenty (20) years.

b. Any owner shall give due consideration to the provision of adequate park and recreational areas and facilities that may be desirable for neighborhood improvement, with special consideration for the health, safety and welfare of those residing in the general vicinity of the site covered by the Plan, recognizing the uses contemplated in the Project Area.

c. All such buildings or portions of buildings which are to remain within the Project Area shall be rehabilitated or constructed in conformity with all applicable codes and ordinances of the City.

d. Any new construction shall also conform to all applicable provisions, requirements, and regulations of this Plan, as well as to all applicable codes and ordinances of the City.

All owner participation agreements will address phasing issues, development timing, phasing, justification and eligibility of project costs, and achievement of the objectives of the Plan. The Agency shall retain its discretion in the funding level of its participation. Obligations under owner participation agreements shall terminate no later than the termination date of this Plan, December 31, 2045. The Agency shall retain its discretion to negotiate an earlier date to accomplish all obligations under any owner participation agreement.

In all participation agreements, participants who retain real property shall be required to join in the recordation of such documents as may be necessary to make the provisions of this Plan applicable to their properties. Whether or not a participant enters into a participation agreement with the Agency, the provisions of this Plan are applicable to all public and private property in the Project Area.

In the event a participant under a participation agreement fails or refuses to rehabilitate, develop, use, and maintain its real property pursuant to this Plan and a participation agreement, the real property or any interest therein may be acquired by the Agency in accordance with Section 305.1 of this Plan and sold or leased for rehabilitation or development in accordance with this Plan.

Owner participation agreements may be used to implement the following objectives:

a. Encouraging property owners to revitalize and/or remediate deteriorated areas or deteriorating areas of their parcels to accelerate development in the Project Area.

b. Subject to the limitations of the Law and the Act, providing incentives to property owners to encourage utilization and expansion of existing permitted uses during the transition period to prevent a proliferation of vacant and deteriorated parcels in the Project Area during the extended redevelopment of the Project Area.

c. To accommodate improvements and expansions allowed by City regulations and generally consistent with this Plan for the Project Area.

d. Subject to the limitations of the Law and Act, providing incentives to improve nonconforming properties so they implement the design guidelines contained in this Plan to the extent possible and to encourage an orderly transition from nonconforming to conforming uses through the term of the Plan.

e. Provide for advance funding by the developer/owner participant of those certain public improvements related to or needed for the private development and related to the construction of certain public improvements. In that event, the Agency will agree as set out in the participation agreement to reimburse a portion of, or all of, the costs of public improvements identified in the participation agreement from the revenue allocation generated by the private development.

304 Cooperation with Public Bodies

Certain public bodies are authorized by state law to aid and cooperate, with or without consideration, in the planning, undertaking, construction, or operation of this Project. The Agency shall seek the aid and cooperation of such public bodies and shall attempt to coordinate this Plan with the activities of such public bodies in order to accomplish the purposes of redevelopment and the highest public good.

The Agency, by law, is not authorized to acquire real property owned by public bodies without the consent of such public bodies. The Agency will seek the cooperation of all public bodies which own or intend to acquire property in the Project Area. All plans for development of property in the Project Area by a public body shall be subject to Agency approval, in the event the Agency is providing any financial assistance.

Subject to applicable authority, the Agency may impose on all public bodies the planning and design controls contained in this Plan to ensure that present uses and any future development by public bodies will conform to the requirements of this Plan. The Agency is authorized to financially (and otherwise) assist any public entity in the cost of public land, buildings, facilities, structures, or other improvements of the Project Area as allowed by the Law and Act.

The Agency intends to cooperate to the extent allowable with the City for the engineering, design, installation, construction, and/or reconstruction of public infrastructure

improvements, including, but not limited to improvements to rights-of-way, including Pioneer Road improvements and related streetscapes; construction of the Whitewater Bridge over the Porter Canal and the Whitewater Street Extension, including right-of-way and streetscape improvements; improvements to the Battle Creek Canal; other public infrastructure installation, expansion and/or upgrades to sewer facilities, water facilities, fiber optic facilities, natural gas facilities and power facilities; improvements to storm drainage infrastructure; improvements to streetscapes, curbs, gutters, sidewalks, pathways and other pedestrian and cycling improvements; and other improvements set forth in Section 301 and in Attachment 5. The Agency shall also cooperate with the City on various relocation, screening, or undergrounding projects. To the extent any public entity, including the City has funded certain public infrastructure improvements, the Agency may reimburse those entities for those expenses. The Agency also intends to cooperate and seek available assistance from state, federal and other sources for economic development.

In the event the Agency is participating in the public development by way of financial incentive or otherwise, the public body shall enter into a participation agreement with the Agency and then shall be bound by the Plan and other land use elements and shall conform to those standards specified in Section 303.1 of this Plan.

This Plan does not financially bind or obligate the City, Agency, and/or any other public entity to any project or property acquisition; rather, for purposes of determining the economic feasibility of the Plan certain projects and expenditures have been estimated and included in the analysis. Agency revenue and the ability to fund reimbursement of eligible Project Costs is more specifically detailed in any owner participation agreement and in the annual budget adopted by the Agency Board.

305 Property Acquisition

305.1 Real Property

Only as specifically authorized herein, the Agency may acquire, through the voluntary measures described below, but is not required to acquire, any real property located in the Project Area where it is determined that the property is needed for construction of public improvements, required to eliminate or mitigate the deteriorated or deteriorating conditions, to facilitate economic development, including acquisition of real property intended for disposition to qualified developers through a competitive process, and as otherwise allowed by law. The acquisition shall be by any means authorized by law, including, but not limited to, the Law, the Act, and the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, but shall not include the right to invoke eminent domain authority except as authorized by Idaho law and provided herein. The Agency is authorized to acquire either the entire fee or any other interest in real property less than a fee, including structures and fixtures upon the real property, without acquiring the land upon which those structures and fixtures are located.

The Agency intends to acquire any real property through voluntary or consensual gift, devise, exchange, or purchase. Such acquisition of property may be for the development of the public improvements identified in this Plan. Such properties may include properties owned by private parties or public entities. This Plan allows the Agency's use of its resources for property acquisition. This Plan does not anticipate the Agency's widespread use of its resources for property acquisition, except for the construction of public improvements or to dispose of real property to a qualified developer, in the event the Agency does acquire such property, to incent certain types of development as permitted by the Law and Act.

In the event the Agency identifies certain property which should be acquired to develop certain public improvements intended to be constructed under the provisions of this Plan, the Agency shall coordinate such property acquisition with any other public entity (e.g., without limitation, the City, the state of Idaho, or any of its authorized agencies), including the assistance of the Agency of funds to acquire said property through a voluntary acquisition or the public entity's invoking of its eminent domain authority as limited by Idaho Code Section 7-701A.

The Agency is authorized by this Plan to acquire the properties for the uses identified in Attachment 3 hereto, including but not limited to property to be acquired for the extension or expansion of certain rights-of-way or to accommodate undergrounding public facilities.

The Agency is authorized by this Plan and Idaho Code §§ 50-2010 and 50-2018(12) to acquire the properties identified in Attachment 3 hereto for the purposes set forth in this Plan. The Agency has identified its intent to acquire and/or participate in the development of certain public improvements, including, but not limited to those defined in Section 301 of the Plan and in Attachment 5. The Agency's property acquisition will result in remediating deteriorating conditions in the Project Area by facilitating development consistent with the Comprehensive Plan. The public improvements are intended to be dedicated to the City and/or other appropriate public entity, as the case may be, upon completion. The Agency reserves the right to determine which properties identified, if any, should be acquired. The open land areas qualify for Agency acquisition as further set forth in Section 105 of this Plan.

It is in the public interest and may be necessary, in order to eliminate the conditions requiring redevelopment and in order to execute this Plan, for the power of eminent domain to be employed by the Agency, or by the City with the Agency acting in an advisory capacity,[2] to acquire real property in the Project Area for the public improvements identified in this Plan, which cannot be acquired by gift, devise, exchange, purchase, or any other lawful method.

Under the provisions of the Act, the urban renewal plan "shall be sufficiently complete to indicate such land acquisition, demolition, and removal of structures, redevelopment, improvements, and rehabilitation as may be proposed to be carried out in the urban renewal area." Idaho Code § 50-2018(12). The Agency has generally described those properties by use as set out in Attachment 3 for acquisition for the construction of public improvements. The

[2] House Bill 1044, adopted by the Idaho Legislature during the 2021 Legislative Session, limited the Agency's ability to exercise eminent domain.

Agency may also acquire property for the purpose of developing streetscape and public utilities. The Agency reserves the right to determine which properties, if any, should be acquired.

305.2 Personal Property

Generally, personal property shall not be acquired. However, where necessary in the execution of this Plan, the Agency is authorized to acquire personal property in the Project Area by any lawful means, for the purpose of developing the public improvements described in section 305.1.

306 Property Management

During the time real property, if any, in the Project Area is owned by the Agency, such property shall be under the management and control of the Agency. Such property may be rented or leased by the Agency pending its disposition for development and/or redevelopment, and such rental or lease shall be pursuant to such policies as the Agency may adopt.

307 Relocation of Persons (Including Individuals and Families), Business Concerns, and Others Displaced by the Project

If the Agency receives federal funds for real estate acquisition and relocation, the Agency shall comply with 24 C.F.R. Part 42, implementing the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended.

The Agency reserves the right to extend benefits for relocation to those not otherwise entitled to relocation benefits as a matter of state law under the Act or the Law. The Agency may determine to use as a reference the relocation benefits and guidelines promulgated by the federal government, the state government, or local government, including the State Department of Transportation. The intent of this section is to allow the Agency sufficient flexibility to award relocation benefits on some rational basis, or by payment of some lump-sum per case basis. The Agency may also consider the analysis of replacement value for the compensation awarded to either owner occupants or businesses displaced by the Agency to achieve the objectives of this Plan. The Agency may adopt relocation guidelines which would define the extent of relocation assistance in non-federally assisted projects and which relocation assistance to the greatest extent feasible would be uniform. The Agency shall also coordinate with the various local, state, or federal agencies concerning relocation assistance as may be warranted.

In the event the Agency's activities result in displacement, the Agency shall comply with, at a minimum, the standards set forth in the Law. The Agency shall also comply with all applicable state laws concerning relocation benefits. The Agency shall also coordinate with the various local, state, or federal agencies concerning relocation assistance.

308 Demolition, Clearance, and Site Preparation

The Agency is authorized (but not required) to demolish and clear buildings, structures, and other improvements from any real property in the Project Area as necessary to carry out the purposes of this Plan.

Further, the Agency is authorized (but not required) to prepare, or cause to be prepared, as building sites any real property in the Project Area owned by the Agency including site preparation. In connection therewith, the Agency may cause, provide for, or undertake the installation or construction of streets, utilities, parks, pedestrian walkways, public parking facilities, drainage facilities, and other public improvements necessary to carry out this Plan.

309 Property Disposition and Development

309.1 Disposition by the Agency

For the purposes of this Plan, the Agency is authorized to sell, lease, lease/purchase, exchange, subdivide, transfer, assign, pledge, encumber by mortgage or deed of trust, or otherwise dispose of any interest in real property under the reuse provisions set forth in Idaho law, including Idaho Code § 50-2011 and pursuant to any disposition policies adopted by the Agency. To the extent permitted by law, the Agency is authorized to dispose of real property by negotiated lease, sale, or transfer without public bidding.

Real property acquired by the Agency may be conveyed by the Agency and, where beneficial to the Project Area, without charge to any public body as allowed by law. All real property acquired by the Agency in the Project Area shall be sold or leased to public or private persons or entities for development for the uses permitted in this Plan.

309.2 Disposition and Development Agreements

To provide adequate safeguards to ensure that the provisions of this Plan will be carried out and to prevent the recurrence of deteriorating conditions, all real property sold, leased, or conveyed by the Agency is subject to the provisions of this Plan.

The Agency shall reserve such powers and controls in the disposition and development documents as may be necessary to prevent transfer, retention, or use of property for speculative purposes and to ensure that development is carried out pursuant to this Plan.

Leases, lease/purchases, deeds, contracts, agreements, and declarations of restrictions of the Agency may contain restrictions, covenants, covenants running with the land, rights of reverter, conditions subsequent, equitable servitudes, or any other provisions necessary to carry out this Plan. Where appropriate, as determined by the Agency, such documents, or portions thereof, shall be recorded in the office of the Recorder of Bonneville County, Idaho.

All property in the Project Area is hereby subject to the restriction that there shall be no discrimination or segregation based upon race, color, creed, religion, sex, age, national origin, or ancestry in the sale, lease, sublease, transfer, use, occupancy, disability/handicap, tenure, or enjoyment of property in the Project Area. All property sold, leased, conveyed, or subject to a disposition and development agreement shall be expressly subject by appropriate documents to the restriction that all deeds, leases, or contracts for the sale, lease, sublease, or other transfer of land in the Project Area shall contain such nondiscrimination and nonsegregation clauses as required by law.

As required by law or as determined in the Agency's discretion to be in the best interest of the Agency and the public, the following requirements and obligations shall be included in the disposition and development agreement.

That the developers, their successors, and assigns agree:

a. That a detailed scope and schedule for the proposed development shall be submitted to and agreed upon by the Agency.

b. That the purchase or lease of the land and/or subterranean rights and/or air rights is for the purpose of redevelopment and not for speculation.

c. That the building of improvements will be commenced and completed as jointly scheduled and determined by the Agency and the developer(s).

d. That the site and construction plans will be submitted to the Agency for review as to conformity with the provisions and purposes of this Plan and to support the planning, design and transportation goals set forth in the Comprehensive Plan.

e. All new construction shall have a minimum estimated life of no less than twenty (20) years.

f. That rehabilitation of any existing structure must assure that the structure is safe and sound in all physical respects and be refurbished and altered to bring the property to an upgraded marketable condition which will continue throughout an estimated useful life for a minimum of twenty (20) years.

g. That the Agency receives adequate assurance acceptable to the Agency to ensure performance under the contract for sale.

h. All such buildings or portions of the buildings which are to remain within the Project Area shall be reconstructed in conformity with all applicable codes and ordinances of the City.

i. All disposition and development documents shall be governed by the provisions of Section 407 of this Plan.

j. All other requirements and obligations as may be set forth in any participation policy established and/or amended by the Agency.

The Agency also reserves the right to determine the extent of its participation based upon the achievements of the objectives of this Plan. Obligations under any disposition and development agreement and deed covenants, except for covenants which run with the land beyond the termination date of this Plan, shall terminate no later than December 31, 2045. The Agency shall retain its discretion to negotiate an earlier date to accomplish all obligations under any disposition and development agreement.

309.3 Development by the Agency

To the extent now or hereafter permitted by law, the Agency is authorized to pay for, develop, or construct public improvements within the Project Area for itself or for any public body or entity, which public improvements are or would be of benefit to the Project Area. Specifically, the Agency may pay for, install, or construct the public improvements authorized under Idaho Code §§ 50-2007, 50-2018(10) and (13), and 50-2903(9), (13), and (14), and as otherwise identified in Attachment 5, attached hereto and incorporated herein by reference, and may acquire or pay for the land required, therefore.

Any public facility ultimately owned by the Agency shall be operated and managed in such a manner to preserve the public purpose nature of the facility. Any lease agreement with a private entity or management contract agreement shall include all necessary provisions sufficient to protect the public interest and public purpose.

The Agency may enter into contracts, leases, and agreements with the City or other public body or private entity pursuant to this section, and the obligation of the Agency under such contract, lease, or agreement shall constitute an indebtedness of the Agency as described in Idaho Code § 50-2909 which may be made payable out of the taxes levied in the Project Area and allocated to the Agency under Idaho Code § 50-2908(2)(b) and Section 500 of this Plan or out of any other available funds.

310 Development Plans

All development plans (whether public or private) prepared, pursuant to an owner participation or disposition and development agreement, shall be submitted to the Agency Board for approval and review. All development in the Project Area must conform to those standards specified in Section 407. Additionally, development must be consistent with all City ordinances, design overlays and be supportive of the goals set forth in the Plan and the Comprehensive Plan.

311 Participation with Others

Under the Law, the Agency has the authority to lend or invest funds obtained from the federal government for the purposes of the Law if allowable under federal laws or regulations.

The federal funds that may be available to the Agency are governed by regulations promulgated by the Department of Housing and Urban Development for the Community Development Block Grant Program ("CDBG"), the Economic Development Administration, the Small Business Administration, or other federal agencies. In order to enhance such grants, the Agency's use of revenue allocation funds is critical.

Under those regulations the Agency may participate with the private sector in the development and financing of those private projects that will attain certain federal objectives.

The Agency may, therefore, use the federal funds for the provision of assistance to private for-profit business, including, but not limited to, grants, loans, loan guarantees, interest supplements, technical assistance, and other forms to support, for any other activity necessary or appropriate to carry out an economic development project.

As allowed by law, the Agency may also use funds from any other sources or participate with the private or public sector with regard to any programs administered by the Idaho Department of Commerce, or other State or federal agencies, for any purpose set forth under the Law or Act.

The Agency may enter into contracts, leases, and agreements with the City, or other public body or private entity, pursuant to this section, and the obligation of the Agency under such contract, lease, or agreement shall constitute an indebtedness of the Agency as described in Idaho Code § 50-2909 which may be made payable out of the taxes levied in the Project Area and allocated to the Agency under Idaho Code § 50-2908(2)(b) and Section 500 of this Plan or out of any other available funds.

312 Conforming Owners

The Agency may, at the Agency's sole and absolute discretion, determine that certain real property within the Project Area presently meets the requirements of this Plan, and the owner of such property will be permitted to remain as a conforming owner without a participation agreement with the Agency, provided such owner continues to operate, use, and maintain the real property within the requirements of this Plan.

313 Arts Funding

The Agency encourages public art and performing arts through joint ventures with private developers and in cooperation with the City. Whenever possible, any Agency arts funding will be used to leverage additional contributions from developers, other private sources, and public or quasi-public entities for purposes of including public art within the projects identified in this Plan.

400 USES PERMITTED IN THE PROJECT AREA

401 Designated Land Uses

The Agency intends to rely upon the overall land use designations and zoning classifications of the City, as may be amended, and as depicted on Attachment 4 and as set forth in the City's Comprehensive Plan and within the City's zoning code,, including the future land use map and zoning classifications, as may be amended. The Project Area is zoned Central Commercial, with the Comprehensive Plan designating the area as envisioned to be Mixed-Use Centers and Corridors on the future land use map. Provided, however, nothing herein within this Plan shall be deemed to be granting any particular right to zoning classification or use.

402 Public Rights-of-Way

The Project Area contains existing maintained public rights-of-way included within the boundaries, as shown on Attachment 1 and within several maps included within Attachment 5, including but not limited to portions of: Pioneer Road; and the construction of the Whitewater Bridge and the Whitewater Street expansion. Any new roadways, including new local, collectors, and/or arterials to be engineered, designed, installed, and constructed in the Project Area, will be constructed in conjunction with any applicable policies and design standards of the City (and State and Federal standards, as the case may be) regarding dedicated rights-of-way. Additional public streets, alleys, and easements may be created in the Project Area as needed for proper development, and other potential roadways generally shown in Attachment 5.

Additional improvements to existing streets, alleys and easements may be created, improved, or extended in the Project Area as needed for development. Existing dirt roadways, streets, easements, and canal, irrigation or drainage laterals or ditches may be abandoned, closed, or modified as necessary for proper development of the Project Area, in accordance with any applicable policies and standards of the Idaho Transportation Department or the City regarding changes to dedicated rights-of-way, and appropriate irrigation or drainage districts or canal companies, regarding changes to canals, laterals or ditches.

Any development, maintenance, and future changes in the interior or exterior street layout shall be in accordance with the objectives of this Plan and the design standards of the City, or the Idaho Department of Transportation as may be applicable; shall be effectuated in the manner prescribed by State and local law; and shall be guided by the following criteria:

a. A balancing of the needs of proposed and potential new developments for adequate pedestrian and vehicular access, vehicular parking, and delivery loading docks with the similar needs of any existing developments permitted to remain. Such balancing shall take into consideration the rights of existing owners and tenants under the rules for owner and tenant participation adopted by the Agency for the Project and any participation agreements executed thereunder;

b. The requirements imposed by such factors as topography, traffic safety, and aesthetics; and

c. The potential need to serve not only the Project Area and new or existing developments, but to also serve areas outside the Project Area by providing convenient and efficient vehicular access and movement.

The public rights-of-way may be used for vehicular and/or pedestrian traffic, as well as for public improvements, public and private utilities, and activities typically found in public rights-of-way.

403 Interim Uses

Pending the ultimate development of land by developers and participants, the Agency is authorized to use or permit the use of any land in the Project Area for interim uses that are not in conformity with the uses permitted in this Plan. However, any interim use must comply with the City Code.

404 Development in the Project Area Subject to the Plan

All real property in the Project Area, under the provisions of either a disposition and development agreement or an owner participation agreement, is made subject to the controls and requirements of this Plan. No such real property shall be developed, redeveloped, rehabilitated, or otherwise changed after the date of the adoption of this Plan, except in conformance with the provisions of this Plan.

405 Construction Shall Comply with Applicable Federal, State, and Local Laws and Ordinances and Agency Development Standards

All construction in the Project Area shall comply with all applicable state laws, the Idaho Falls City Code, as may be amended from time to time, and any applicable City Council ordinances pending codification, including but not limited to, regulations concerning the type, size, density and height of buildings; open space, landscaping, light, air, and privacy; the undergrounding of utilities; limitation or prohibition of development that is incompatible with the surrounding area by reason of appearance, traffic, smoke, glare, noise, odor, or similar factors; parcel subdivision; off-street loading and off-street parking requirements.

In addition to applicable codes, ordinances, or other requirements governing development in the Project Area, additional specific performance and development standards may be adopted by the Agency to control and direct redevelopment activities in the Project Area in the event of a disposition and development agreement or owner participation agreement, including but not limited to compliance with the City of Idaho Falls Bridge and Street Regulation Ordinance, Chapter 1A, Title 11 of the City Code.

406 Nonconforming Uses

This Section applies to property owners seeking assistance from the Agency regarding their property. The Agency may permit an existing use to remain in an existing building and site usage in good condition, which use does not conform to the provisions of this Plan, provided that such use is generally compatible with existing and proposed developments and uses in the Project Area. The owner of such a property must be willing to enter into an owner participation agreement and agree to the imposition of such reasonable restrictions as may be necessary to protect the development and use of the Project Area.

The Agency may authorize additions, alterations, repairs, or other improvements in the Project Area for uses which do not conform to the provisions of this Plan where such improvements are within a portion of the Project Area where, in the determination of the Agency, such improvements would be compatible with surrounding Project uses and development.

All nonconforming uses shall also comply with the City codes and ordinances.

407 Design Guidelines for Development under a Disposition and Development Agreement or Owner Participation Agreement

Within the limits, restrictions, and controls established in this Plan, the Agency is authorized to establish heights of buildings, density, land coverage, setback requirements, design criteria, traffic circulation, traffic access, and other development and design controls necessary for proper development of both private and public areas within the Project Area. Any development must also comply with the City's zoning ordinance regarding heights, setbacks, density, and other like standards.

In the case of property which is the subject of a disposition and development agreement or owner participation agreement with the Agency, no new improvement shall be constructed, and no existing improvement shall be substantially modified, altered, repaired, or rehabilitated, except in accordance with this Plan. Under a disposition and development agreement or owner participation agreement, the design guidelines and land use elements of the Plan shall be achieved to the greatest extent feasible, though the Agency retains the authority to grant minor variations under this Plan and subject to a negotiated agreement between the Agency and the developer or property owner.

Under those agreements, the architectural, landscape, and site plans shall be submitted to the Agency and approved in writing by the Agency. In such agreements, the Agency may impose additional design controls. The Agency shall find that any approved plans do comply with this Plan. The Agency reserves the right to impose such design standards on an ad hoc basis through the approval process of the disposition and development agreement or owner participation agreement. Any change to such approved design must be consented to by the Agency and such consent may be conditioned upon reduction of Agency's financial participation toward the Project.

In the event the Agency adopts design standards or controls, those provisions will thereafter apply to each site or portion thereof in the Project Area. These additional design standards or controls will be implemented through the provisions of any disposition and development agreement or owner participation agreement. These controls are in addition to any standards and provisions of any applicable City building or zoning ordinances; provided, however, each and every development shall comply with all applicable City zoning and building ordinances.

500 METHODS OF FINANCING THE PROJECT

501 General Description of the Proposed Financing Method

The Agency is authorized to finance this Project with revenue allocation funds; inter-district loans,; financial assistance from the City (loans, grants, other financial assistance), state of Idaho, federal government or other public entities; interest income; developer advanced funds; donations; loans from private financial institutions (bonds, notes, line of credit); the lease or sale of Agency-owned property; public parking revenue; or any other available source, public or private, including assistance from any taxing district or any public entity.

The Agency is also authorized to obtain advances, lines of credit, borrow funds, and create indebtedness in carrying out this Plan. The Agency may also consider a transfer or grant from the City, an inter-fund transfer from other urban renewal project areas or enter into a memorandum of understanding with any property owner and/or related entity to fund the establishment of the Project Area. The principal and interest on such advances, funds, and indebtedness may be paid from any funds available to the Agency. The City, as it is able, may also supply additional assistance through City loans and grants for various public improvements and facilities. The City or any other public agency, as properly budgeted and subject to any constitutional and/or statutory limitations, may expend money to assist the Agency in carrying out this Project.

As allowed by law and subject to restrictions as are imposed by law, the Agency is authorized to issue notes or bonds from time to time, if it deems appropriate to do so, in order to finance all or any part of the Project. Neither the members of the Agency nor any persons executing the bonds are liable personally on the bonds by reason of their issuance.

502 Other Loans and Grants

Any other loans, grants, guarantees, or financial assistance from the United States, the state of Idaho CDBG funds, or any other public or private source will be utilized if available. The Agency may consider funding sources through Local Improvement Districts as authorized by state law. Neither the members of the Agency nor any persons executing such loans or grants shall be liable on the loans or grants by reason of their issuance.

503 Revenue Allocation Financing Provisions

The Agency hereby adopts revenue allocation financing provisions as authorized by the Act, effective retroactively to January 1, 2025. These revenue allocation provisions shall apply to all taxing districts which are located in or overlap the Revenue Allocation Area shown and described on Attachments 1 and 2 to this Plan. The Agency shall take all actions necessary or convenient to implement these revenue allocation financing provisions. The Agency specifically finds that the equalized assessed valuation of property within the Revenue Allocation Area is likely to increase as a result of the initiation of the Project.

The Agency, acting by one or more resolutions adopted by its Board, is hereby authorized to apply all or any portion of the revenues allocated to the Agency pursuant to the Act to pay as costs are incurred (pay-as-you-go) or to pledge all or any portion of such revenues to the repayment of any moneys advance-funded by developers or property owners, borrowed, indebtedness incurred, or notes or bonds issued by the Agency to finance or to refinance the Project Costs (as defined in Idaho Code § 50-2903(14)) of one or more urban renewal projects.

The Agency may consider a note or line of credit issued by a bank or lending institution premised upon revenue allocation funds generated by a substantial private development contemplated by the Study, as defined in Section 503.1, which would allow the Agency to more quickly fund the public improvements contemplated by this Plan. Likewise, a developer/owner advanced funding of certain eligible public infrastructure improvements to be reimbursed pursuant to an owner participation agreement could achieve the same purpose.

Upon enactment of a City Council ordinance finally adopting these revenue allocation financing provisions and defining the Revenue Allocation Area described herein as part of the Plan, there shall hereby be created a special fund of the Agency into which the County Treasurer shall deposit allocated revenues as provided in Idaho Code § 50-2908. The Agency shall use such funds solely in accordance with Idaho Code § 50-2909 and solely for the purpose of providing funds to pay the Project Costs, including any incidental costs, of such urban renewal projects as the Agency may determine by resolution or resolutions of its Board.

A statement listing proposed public improvements and facilities, a schedule of improvements, the location of proposed public infrastructure improvements, an economic feasibility study, estimated project costs, fiscal impact upon other taxing districts, and methods of financing project costs required by Idaho Code § 50-2905 is included in this Plan and in Attachment 5 to this Plan. This information necessarily incorporates estimates and projections based on the Agency's and consultants' present knowledge and expectations. Attachment 5 also identifies additional public infrastructure projects that may be undertaken by the Agency and/or in partnership with the City, depending on the existence of funding and time remaining in the revenue allocation area. The Agency is hereby authorized to adjust the presently anticipated urban renewal projects and use of revenue allocation financing of the related Project Costs if the Board deems such adjustment necessary or convenient to effectuate the general objectives of the Plan in order to account for revenue inconsistencies, market adjustments, future priorities, developers/owners seeking Agency assistance pursuant to an owner participation agreement, and

unknown future costs. Agency revenue and the ability to fund reimbursement of eligible Project Costs is more specifically detailed in the annual budget.

The Agency may appropriate funds consisting of revenue allocation proceeds on an annual basis without the issuance of notes or bonds. The Agency may also obtain advances or loans from the City, from other revenue allocation areas (inter-district loan), or private entity and financial institutions in order to immediately commence construction of certain of the public improvements. Developer advanced funding of public improvements could also achieve the same purpose. The revenue allocation proceeds are hereby irrevocably pledged for the payment of the principal and interest on the advance of monies or making of loans or the incurring of any indebtedness such as bonds, notes, and other obligations (whether funded, refunded, assumed, or otherwise) by the Agency to finance or refinance the Project in whole or in part, including reimbursement to any owner/developer or public entity for the cost of eligible public improvements pursuant to a participation agreement.

Revenues will continue to be allocated to the Agency until termination of the revenue allocation area as set forth in Section 800. Attachment 5 incorporates estimates and projections based on the Agency's and its consultants' present knowledge and expectations concerning the length of time to complete the improvements and estimated future revenues. The activity may take longer depending on the significance and timeliness of development. Alternatively, the activity may be completed earlier if revenue allocation proceeds are greater, or the Agency obtains additional funds from another source.

The Agency is authorized to make such pledges as to specific advances, loans, and indebtedness as appropriate in carrying out the Project. The Agency reserves the right to either pay for Project Costs from available revenue (pay-as-you-go basis) or borrow funds by incurring debt through notes or other obligations.

Revenue allocation proceeds are deemed to be only a part of the proposed funding sources for the payment of public improvements and other project improvements. Additionally, project funding may be phased for the improvements, allowing various sources of funds to be accumulated for use.

503.1 Economic Feasibility Study

Attachment 5 constitutes the Economic Feasibility Study (the "Study"), prepared by Brad Cramer, Perspective Planning & Consulting LLC. The Study constitutes the financial analysis required by the Act and is based upon existing information from property owners, developers, the Agency, the City, and others.

503.2 Assumptions and Conditions/Economic Feasibility Statement

The information contained in Attachment 5 assumes certain completed and projected actions. All debt is projected to be repaid no later than the duration period of the Plan. The total

amount of indebtedness (and all other loans or indebtedness), developer reimbursement and the amount of revenue generated by revenue allocation are dependent upon the extent and timing of private development. Should all the development take place as projected, the project indebtedness could be extinguished earlier, dependent upon other legal obligations. Should private development take longer to materialize, or should the private development be substantially less than projected, then the amount of revenue generated will be substantially reduced and debt may continue for its full term.

The Plan and the Plan Attachments incorporate estimates and projections based on the Agency's and consultants' present knowledge and expectations. The Plan proposes certain public improvements as set forth in Attachment 5 and in Section 301, which will facilitate developments in the Revenue Allocation Area as more fully guided by the design, planning, development, use, and transportation goals set forth in the Comprehensive Plan.

The assumptions set forth in the Study are based upon the best information available to the Agency and its consultants through public sources or discussions with property owners, developers, the City staff, and others. The information has been analyzed by the Agency and its consultants in order to provide an analysis that meets the requirements set forth under the Law and Act. At the point in time when the Agency may seek a loan from lenders or others, a more detailed and then-current financial pro forma will be presented to those lenders or underwriters for analysis to determine the borrowing capacity of the Agency. As set forth herein, the Agency reserves the right to fund the Project on a "pay-as-you-go" basis. The Agency Board will prioritize the activities set forth in this Plan and determine what funds are available and what activities can be funded. The Agency will establish those priorities through its mandated annual budgetary process.

The project list within Attachment 5 is prioritized by way of feasibility based on timing of developer advanced funding of potentially eligible improvements and projects, estimated revenues to be received, amounts funded, and by year of funding. The projected timing of funding is primarily a function of the availability of financial resources and market conditions but is also strategic, considering the timing of anticipated or projected private development partnership opportunities and the ability of certain strategic activities to stimulate development at a given point in time within the duration of the Plan and Project Area. Attachment 5 also identifies other public improvements that may be funded during the duration of the Plan with revenue allocation proceeds but are not contemplated to be advance funded by any developer/property owners, including planning, design, engineering and construction of improvements to streets; streetscapes; pedestrian and bicycle improvements; enhanced landscaping; and storm drainage improvements on rights-of-way within the Project Area. Cost estimates are too speculative to include in Attachment 5; however, the Study anticipates $1,800,000 to $2,000,000 in revenue allocation proceeds that could be allocated to the foregoing improvements should development within the Project Area occur as projected.

The assumptions concerning revenue allocation proceeds are based upon certain anticipated or projected new developments, assessed value increases, and assumed tax levy rates as more specifically set forth in Attachment 5. Further, the financial analysis set forth in

Attachment 5 has taken into account and excluded levies that do not flow to the Agency consistent with Idaho Code § 50-2908. In projecting new construction, the Study considered parcels identified as expected to develop over the life of the Project Area, communications with developers/property owners, City staff and others.

The types of new construction expected in the Project Area are mixed-use, multi-family residential, retail, office and commercial facilities. Additional improvements include improvements to streets, rights-of-way, streetscapes, and other public facilities, including but not limited to sewer, water, fiber optic, natural gas, power and drainage facilities. However, without a method to construct the identified public improvements such as sewer improvements, street infrastructure, and pedestrian amenities, development is unlikely to occur in much of the Project Area.

It is understood that application of certain exemptions, including the homeowner's exemption and Idaho Code § 63-602K, which provides for personal property tax exemption to businesses may have the effect of reducing the increment value, which in turn reduces revenue.

503.3 Ten Percent Limitation[3]

Under the Act, the base assessed valuation for all revenue allocation areas cannot exceed gross/net ten percent (10%) of the current assessed taxable value for the entire City. According to the Bonneville County Assessor, the assessed taxable value for the City as of June 2024 is $8,086,452,575. Therefore, the 10% limit is $808,645,257.

The adjusted base assessed value of each of the existing revenue allocation areas and the assessed taxable value of the proposed Project Area as of June 2024, is as follows:

River Commons District	$131,823
Eagle Ridge District	$7,343,365
Jackson Hole Junction District	$700,421
Pancheri East Bank District	$5,939,063
Anderson Bush District	$416,321
Stanley Boge District	$41,521,753
Snake River West Proposed RAA	$388,053[4]
Yellowstone Square Proposed RAA	$9,404,034
Total of Existing and Proposed Districts	$65,844,833

[3] Due to the timing of the assessment process and creation of this Plan, the June (non-equalized) 2024 values have been used to establish compliance with the 10% limitation. Using the estimated 2024 values, the total value of the existing revenue allocation areas combined with the value of this Project Area are significantly less than 10% of the total assessed taxable value of the City (only .81%). Even assuming an increase to the values, the combined base values will not exceed 10% of the total assessed taxable value of the City.

[4] The base value of the proposed Project Area was calculated using 2024 values for all parcels other than a 4.59 acre parcel owned by LLKM Properties, LLC, which used the 2023 value. This is due to a small change in parcel lines which occurred during the finalization of the Study. The change in parcel lines requires reappraisal of the values for each new section by the Bonneville County Assessor's Office, which had not yet occurred.

The adjusted base values for the combined existing revenue allocation areas and the estimated base value for the proposed Project Area is $65,844,833, which is less than 10% of the City's estimated 2024 taxable value.

503.4 Financial Limitation

The Study identifies several capital improvement projects. Use of any particular funding source for any particular purpose is not assured or identified. Use of the funding source shall be conditioned on any limitations set forth in the Law, the Act, by contract, or by other federal regulations. If revenue allocation funds are unavailable, then the Agency will need to use a different funding source for that improvement.

The amount of funds available to the Agency from revenue allocation financing is directly related to the assessed value of new improvements within the Revenue Allocation Area. Under the Act, the Agency is allowed the revenue allocation generated from inflationary increases and new development value. Increases have been assumed based upon the projected value of new development as that development occurs along with possible land reassessment based on a construction start.

The Study, with the various estimates and projections, constitutes an economic feasibility study. Costs and revenues are analyzed, and the analysis shows the need for public capital funds during the project. Multiple financing sources are contemplated in the Study, including proposed revenue allocation notes, annual revenue allocations, developer contributions, City, or other public entity contributions, interfund loan, and other financing sources as permitted by law. This Study identifies the kind, number, and location of all proposed public works or improvements, a detailed list of estimated project costs, a description of the methods of financing illustrating project costs, and the time when related costs or monetary obligations are to be incurred.[5] Based on these funding sources, the conclusion is that the Project is feasible.

The Agency reserves the discretion and flexibility to use revenue allocation proceeds in excess of the amounts projected in the Study for the purpose of funding the identified projects and improvements, including those projects identified, but for which providing cost estimates was deemed too speculative. The projections in the Study are based on reasonable assumptions and existing market conditions. However, should the Project Area result in greater than anticipated revenues, the Agency specifically reserves the ability to fund the additional activities and projects identified in the Plan. Further, the Agency reserves the discretion and flexibility to use other sources of funds unrelated to revenue allocation to assist in the funding of the improvements and activities identified, including but not limited to owner participation agreements and disposition and development agreements. The Agency may also re-prioritize projects pursuant to market conditions, project timing, funding availability, etc., as more specifically detailed in the annual budget.

The proposed timing for the public improvements and projects may have to be adjusted depending upon the availability of funds and the Agency's ability to finance any portion of the

[5] *See* Idaho Code § 50-2905.

Project. **Any adjustment to Project timing or funding is technical or ministerial in nature and shall not be considered a modification of the Plan pursuant to Idaho Code § 50-2903A.**

Attachment 5 lists those public improvements and projects the Agency intends to construct or fund (directly or through reimbursement) through the term of the Plan. The costs of improvements and projects are estimates only as it is impossible to know with any certainty what the costs of improvements and projects will be in future years. There is general recognition that construction costs fluctuate and are impacted by future unknowns, such as, the cost of materials and laborers. Final costs will be determined by way of construction contract public bidding or by an agreement between the developer/owner and/or public entity and Agency. The listing of public improvements and projects does not commit the Agency, City, or other public entity, to any particular level of funding; rather, identification of the activity in the Plan allows the Agency to negotiate the terms of any reimbursement with the developer and/or the public entities. This Plan does not financially bind or obligate the Agency, City or other public entity to any project or property acquisition; rather, for purposes of determining the economic feasibility of the Plan certain projects and expenditures have been estimated and included in the analysis. The City has not committed to fund any public infrastructure improvements within the Project Area. Such decisions concerning capital improvement projects and/or other expenditures are made by the City annually pursuant to its budget and appropriation process. Agency revenue and the ability to fund reimbursement of eligible Project Costs is more specifically detailed in any participation agreement and in the annual budget adopted by the Agency Board. The proposed location and siting of the proposed public infrastructure and other improvement projects in the Project Area are generally described in Attachment 5 and this Plan recognizing that the specific location of the projects will depend on the type and timing of development. The specific location of the improvements or the change in the location of the improvements identified on Attachment 5 is technical and/or ministerial and does not constitute a modification to the Plan.

The Agency reserves its discretion and flexibility in deciding which improvements are more critical for development or redevelopment, and the Agency intends to coordinate its public improvements with associated development by private developers/owners. Where applicable, the Agency also intends to coordinate its participation in the public improvements with the receipt of certain grants or loans which may require the Agency's participation in some combination with the grant and loan funding.

Generally, the Agency expects to develop those improvements and fund the projects identified in Attachment 5 (through reimbursement) first, in conjunction with private development within the Project Area generating the increment as identified in Attachment 5. The Agency may undertake the additional public infrastructure improvements identified in Attachment 5 that may be funded during the duration of the Plan with revenue allocation proceeds but are not contemplated to be advance funded by any developer/property owners, including planning, design, engineering and construction of street and streetscape improvements and enhanced landscaping and pedestrian/bicyclist improvements within the Project Area. Cost estimates are too speculative to include in Attachment 5; however, the Study anticipates up to $2,800,000 in revenue allocation proceeds that could be allocated to the foregoing improvements.

The Plan has shown that the equalized valuation of the Revenue Allocation Area as defined in the Plan is likely to increase as a result of the initiation and completion of urban renewal projects pursuant to the Plan.

503.5 Participation with Local Improvement Districts and/or Business Improvement Districts

Under the Idaho Local Improvement District ("LID") Code, Chapter 17, Title 50, Idaho Code, the City has the authority to establish local improvement districts for various public facilities, including, but not limited to, streets, curbs, gutters, sidewalks, storm drains, landscaping, and other like facilities. To the extent allowed by the Law and the Act, the Agency reserves the authority, but not the obligation, to participate in the funding of local improvement district facilities. This participation may include either direct funding to reduce the overall cost of the LID or to participate as an assessed entity to finance the LID project. Similarly, to the extent allowed by the Law and the Act, the Agency reserves the authority, but not the obligation, to participate in the funding of the purposes specified under the Business Improvement Districts, Chapter 26, Title 50, Idaho Code.

504 Issuance of Debt and Debt Limitation

Any debt incurred by the Agency as allowed by the Law and Act shall be secured by revenue allocation funds as allowed by the Act. All such debt shall be repaid within the duration of this Plan, except as may be authorized by law.

505 Impact on Other Taxing Districts and Levy Rate

An estimate of the overall impact of the revenue allocation project on each taxing district is shown in the Study through the new development projections set forth in Attachment 5.

The assessed value for each property in a revenue allocation area consists of a base value and an increment value. The base value is the assessed value as of January 1 of the year in which a revenue allocation area is approved by a municipality, with periodic adjustments allowed by Idaho law. The increment value is the difference between the adjusted base assessed value and current assessed taxable value in any given year while the property is in a revenue allocation area. Under Idaho Code § 63-802, taxing entities are constrained in establishing levy rates by the amount each budget of each taxing district can increase on an annual basis. Taxing entities submit proposed budgets to the County Board of Commissioners, which budgets are required to comply with the limitations set forth in Idaho Code § 63-802. Therefore, the impact of revenue allocation on the taxing entities is more of a product of the imposition of Idaho Code § 63-802, then the effect of urban renewal.

The County Board of Commissioners calculates the levy rate required to produce the proposed budget amount for each taxing entity using the assessed values which are subject to each taxing entity's levy rate. Assessed values in urban renewal districts which are subject to

revenue allocation (incremental values) are not included in this calculation. The combined levy rate for the taxing entities is applied to the incremental property values in a revenue allocation area to determine the amount of property tax revenue which is allocated to an urban renewal agency. The property taxes generated by the base values in the urban renewal districts and by properties outside revenue allocation areas are distributed to the other taxing entities. Properties in revenue allocation areas are subject to the same levy rate as they would be outside a revenue allocation area. The difference is how the revenue is distributed. If the overall levy rate is less than assumed, the Agency may receive fewer funds from revenue allocation.

In addition, without the Revenue Allocation Area and its ability to pay for public improvements and public facilities, fewer substantial improvements within the Revenue Allocation Area would be expected during the term of the Plan; hence, there would be lower increases in assessed valuation to be used by the other taxing entities. The Study's analysis is premised upon the fact the proposed development and/or redevelopment would not occur but for the ability to use revenue allocation funds to fund certain significant public infrastructure improvements and projects removing certain impediments to development.

One result of new construction occurring outside the revenue allocation area (Idaho Code §§ 63-802 and 63-301A) is the likely reduction of the levy rate as assessed values increase for property within each taxing entity's jurisdiction.[6] From and after December 31, 2006, Idaho Code § 63-301A prohibits taxing entities from including, as part of the new construction roll, the increased value related to new construction within a revenue allocation area until the revenue allocation authority is terminated. Any new construction within the Project Area is not available for inclusion by the taxing entities to increase their budgets. Upon termination of the Project Area or deannexation of area from the Project Area, the taxing entities will be able to include a percentage[7] of the increment value on the new construction roll for purposes of setting the following year's budget and revenue from such value is not limited to the eight percent cap set forth in Idaho Code § 63-802.

As the 2024 certified levy rates are not determined until November 2024, the 2023 certified levy rates obtained from the publication entitled *2023 Bonneville County Levies Based on Each $1.00 Market Value* found on the Bonneville County website have been used in the Study for purposes of the analysis.[8] For Tax Year 2023, those taxing districts and levy rates are as follows:[9]

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[6] House Bill 389 amended Idaho Code Sections 63-802 and 63-301A limiting the value placed on the new construction roll and available to a taxing district for a budget capacity increase. This could result in lower levy rates over time. Additionally, the impact of House Bill 292 (2023), the property tax relief bill, is unknown, but may also have the effect of lowering levy rates over time.

[7] Pursuant Idaho Code Sections 63-802 and 63-301A, 80% of the total eligible increment value is added to the new construction roll.

[8] Due to the timing of the taxing districts' budget and levy setting process, certification of the 2024 levy rates will not occur until this Plan had been prepared. In order to provide a basis to analyze the impact on the taxing entities, the 2023 levy rates are used. Use of the 2023 levy rates provides a more accurate base than estimating the 2024 levy rates.

[9] It is unclear how the personal property tax exemption set forth in Idaho Code § 63-602KK, and as amended by House Bill 389, effective January 1, 2022, may impact the levy rate.

Taxing Districts	Levy Rates:
Bonneville County Ambulance	.000200786
Bonneville County	.002352847
Bonneville County Road & Bridge	.000036090
School District No. 91	0
Fire District #1	.000529030
College of Eastern Idaho	0.000083419
City of Idaho Falls	.005404480
TOTAL[10]	0.005487899

The Study has made certain assumptions for purposes of determining the economic feasibility of the project:

1. Valuations only include taxable parcels in the Project Area;
2. The base value of the parcels de-annexed from the Eagle Ridge Revenue Allocation Area and included in the Project Area has increased to the current taxable value;
3. Total increment value is assumed to increase 2% per year;
4. Applicable tax levy rate is assumed to decrease 1% per year;
5. The new development timeline for a proposed 272-unit apartment complex and the estimated taxable valuation were provided by the developer. The Study recognizes the delay in revenue allocation proceeds from the time the new development value is on the tax rolls;
6. In projecting timing of payments under an owner participation agreement, the Study recognizes reimbursement commences following receipt of the certificate of occupancy and the Agency receipt of revenue allocation proceeds from the private development project; and
7. The Study assumes the Agency will receive revenue allocation proceeds in the year following termination.

The Study also projects additional revenue from a potential future hotel development, which increases the revenue allocation proceeds available to fund public infrastructure improvements as noted in the Study.

The total projects eligible for reimbursement to the developer are anticipated to be approximately $5,551,594. The Study further projects up to $2,800,000 in revenue to fund the additional public infrastructure projects identified in Attachment 5. In addition to reimbursement to the developer for certain eligible project costs, the Study also contemplates that developer/property owner will be reimbursed for advance funding certain planning costs in the estimated amount of $40,000, pursuant to a memorandum of understanding with the Agency.

[10] Net of voter approved bonds and levies.

Based on the above conservative assumptions, the Project is economically feasible and should be completed by 2045.

Pursuant to Idaho Code § 50-2908, the Agency is not entitled to revenue allocation proceeds from certain levy increases which are allowed by either specific statutory authorization or approved by an election of the qualified electors of the particular taxing district. Therefore, for any levy election, the Agency will not receive revenue allocation funds which would have been generated by imposing that levy on the assessed valuation within the Project Area. The Study has taken this statute into account. This is also the reason there is no impact to the School District No. 91.

506 Other Fund Sources

Other sources of funds may include City, and other public entity partners, owner/developer participation and financing. It is important to note this Plan does not financially bind or obligate the City, Agency and/or any other public entity to any project or property acquisition. The City and/or any other local government entity continues to be subject to statutory and constitutional budget and levy limitations. Agency and/or other public entity participation in any project shall be determined by the amount of revenue allocation funds generated and pursuant to the annual budgeting process.

507 Lease Revenue and Bonds

Under the Law (Idaho Code § 50-2012), the Agency is authorized to issue revenue bonds to finance certain public improvements identified in the Plan. Under that type of financing, the public entity would pay the Agency a lease payment annually which provides certain funds to the Agency to retire the bond debt. Another variation of this type of financing is sometimes referred to as conduit financing, which provides a mechanism where the Agency uses its bonding authority for the Project, with the end user making payments to the Agency to retire the bond debt. These sources of revenues are not related to revenue allocation funds and are not particularly noted in the Study, because of the "pass through" aspects of the financing. Under the Act, the economic feasibility study focuses on the revenue allocation aspects of the Agency's financial model.

These financing models typically are for a longer period of time than the 20-year period set forth in the Act. However, these financing models do not involve revenue allocation funds, but rather funds from the end users which provide a funding source for the Agency to continue to own and operate the facility beyond the term of the Plan as allowed by Idaho Code § 50-2905(8) as those resources involve funds not related to revenue allocation funds.

508 Membership Dues and Support of Community Economic Development

The Act is premised upon economic development being a valid public purpose. To the extent allowed by the Law and the Act, the Agency reserves the authority to use revenue allocation funds to contract with non-profit and charitable organizations established for the

purpose of supporting economic development and job creation. Additionally, the Agency reserves the authority to expend revenue allocation funds to join, participate and support non-profit organizations established to support Agency best practices and administration. The line item of Administration within the Study shall be deemed to include expenditures for the purposes described in this section as may be deemed appropriate during the annual budgetary process.

600 ACTIONS BY THE CITY AND OTHER PUBLIC ENTITIES

The City shall aid and cooperate with the Agency in carrying out this Plan in support of the design, planning, and transportation goals set forth in the Comprehensive Plan and shall take all actions necessary to ensure the continued fulfillment of the purposes of this Plan and to prevent the recurrence or spread in the area of conditions causing deterioration. Actions by the City may include, but not be limited to, the following:

a. Institution and completion of proceedings necessary for changes and improvements in private and publicly owned public utilities within or affecting the Project Area.

b. Revision of zoning (if necessary) within the Project Area to permit the land uses and development authorized by this Plan.

c. Imposition, wherever necessary, of appropriate controls within the limits of this Plan upon parcels in the Project Area to ensure their proper development and use.

d. Provision for administrative enforcement of this Plan by the City after development. The City and the Agency may develop and provide for enforcement of a program for continued maintenance by owners of all real property, both public and private, within the Project Area throughout the duration of this Plan.

e. Building Code enforcement.

f. Performance of the above actions and of all other functions and services relating to public peace, health, safety, and physical development normally rendered in accordance with a schedule which will permit the development and/or redevelopment of the Project Area to be commenced and carried to completion without unnecessary delays.

g. The undertaking and completing of any other proceedings necessary to carry out the Project.

h. Administration of Community Development Block Grant funds that may be made available for this Project.

i. Appropriate agreements with the Agency for administration, supporting services, funding sources, and the like.

j. Joint funding of certain public improvements, subject to public entity annual appropriation, including but not limited to those identified in this Plan and Attachment 5 to the Plan.

k. Use of public entity labor, services, and materials for construction of the public improvements identified in this Plan and in Attachment 5 to this Plan.

l. Assist with coordinating and implementing the public improvements in the Project Area identified in the Study.

n. Waiver of impact fees and permit fees as may be permitted by the law.

o. Contribute land for right-of-way improvements at no cost to support construction of the public improvements lists in the Plan.

The foregoing actions, if taken by the City, do not constitute any commitment for financial outlays by the City.

601 Maintenance of Public Improvements

The Agency has not identified any commitment or obligation for long-term maintenance of the public improvements identified. The Agency will need to address this issue with the appropriate entity, public or private, who has benefited from or is involved in the ongoing preservation of the public improvement. The Agency expects to dedicate public improvements to the City.

700 ENFORCEMENT

The administration and enforcement of this Plan, including the preparation and execution of any documents implementing this Plan, shall be performed by the Agency and/or the City.

800 DURATION OF THIS PLAN, TERMINATION, AND ASSET REVIEW

Except for the nondiscrimination and nonsegregation provisions which shall run in perpetuity, the provisions of this Plan shall be effective, and the provisions of other documents formulated pursuant to this Plan, shall be effective for twenty (20) years from the effective date of the Plan subject to modifications and/or extensions set forth in Idaho Code § 50-2904. The revenue allocation authority will expire on December 31, 2045, except for any revenue allocation proceeds received in calendar year 2046, as contemplated by Idaho Code § 50-2905(7). The Agency may use proceeds in 2046 to complete the projects set forth herein. As stated in the Plan, any owner participation agreement or disposition and development agreement obligations will cease as of December 31, 2045.

Idaho Code § 50-2903(5) provides the Agency shall adopt a resolution of intent to terminate the revenue allocation area by September 1, in the year of termination. In order to provide sufficient notice of termination to the affected taxing districts to allow them to benefit from the increased budget capacity, the Agency will use its best efforts to provide notice of its intent to terminate this Plan and its revenue allocation authority by May 1, 2046, or if the Agency determines an earlier termination date, then by May 1 of the early termination year:

a. When the Revenue Allocation Area plan budget estimates that all financial obligations have been provided for, the principal of and interest on such moneys, indebtedness, and bonds have been paid in full or when deposits in the special fund or funds created under this chapter are sufficient to pay such principal and interest as they come due, and to fund reserves, if any, or any other obligations of the Agency funded through revenue allocation proceeds shall be satisfied and the Agency has determined no additional project costs need be funded through revenue allocation financing, the allocation of revenues under Idaho Code § 50-2908 shall thereupon cease; any moneys in such fund or funds in excess of the amount necessary to pay such principal and interest shall be distributed to the affected taxing districts in which the Revenue Allocation Area is located in the same manner and proportion as the most recent distribution to the affected taxing districts of the taxes on the taxable property located within the Revenue Allocation Area; and the powers granted to the urban renewal agency under Idaho Code § 50-2909 shall thereupon terminate.

b. In determining the termination date, the Plan shall recognize that the Agency shall receive allocation of revenues in the calendar year following the last year of the revenue allocation provision described in the Plan.

c. For the fiscal year that immediately predates the termination date, the Agency shall adopt and publish a budget specifically for the projected revenues and expenses of the Plan and make a determination as to whether the Revenue Allocation Area can be terminated before January 1 of the termination year pursuant to the terms of Idaho Code § 50-2909(4). In the event that the Agency determines that current tax year revenues are sufficient to cover all estimated expenses for the current year and all future years, by May 1, but in any event, no later than September 1, the Agency shall adopt a resolution advising and notifying the local governing body, the county auditor, and the State Tax Commission, recommending the adoption of an ordinance for termination of the Revenue Allocation Area by December 31 of the current year, and declaring a surplus to be distributed as described in Idaho Code § 50-2909 should a surplus be determined to exist. The Agency shall cause the ordinance to be filed with the office of the county recorder and the Idaho State Tax Commission as provided in Idaho Code § 63-215.

Upon termination of the revenue allocation authority of the Plan to the extent the Agency owns or possesses any assets, subject to the following paragraph, the Agency intends to dispose

of any remaining assets by granting or conveying or dedicating such assets to the City, unless based on the nature of the asset, disposition to another public entity is more appropriate.

As allowed by Idaho Code § 50-2905(8), the Agency may retain assets or revenues generated from such assets as long as the Agency shall have resources other than revenue allocation funds to operate and manage such assets.

900 PROCEDURE FOR AMENDMENT OR MODIFICATION

Modification of this Plan by City Council ordinance results in a reset of the base value for the year immediately following the year in which the modification occurred to include the current year's equalized assessed value of the taxable property in the revenue allocation area, effectively eliminating the Agency's revenue stream as more fully set forth in Idaho Code § 50-2903A subject to certain limited exceptions contained therein. As more specifically identified above, the Agency's projections are based on estimated values, estimated levy rates, estimated future development, and estimated costs of future construction/improvements. Annual adjustments, as more specifically set forth in the Agency's annual budget, will be required to account for more/less estimated revenue and prioritization of projects. Any adjustments for these stated purposes are technical and ministerial and are not deemed a modification under Idaho Code § 50-2903A(1)(a)(i). Further, a modification shall not be deemed to occur when "[t]here is a plan amendment to support growth of an existing commercial or industrial project in an existing revenue allocation area, subject to the provisions of section 50-2905A, Idaho Code." Idaho Code § 50-2903A(1)(a)(iv). The Project includes the development and/or redevelopment of a commercial project.

1000 SEVERABILITY

If any one or more of the provisions contained in this Plan to be performed on the part of the Agency shall be declared by any court of competent jurisdiction to be contrary to law, then such provision or provisions shall be null and void and shall be deemed separable from the remaining provisions in this Plan and shall in no way affect the validity of the other provisions of this Plan.

1100 ANNUAL REPORT AND OTHER REPORTING REQUIREMENTS

Under the Law, Idaho Code § 50-2006(5)(c), the Agency is required to file with the City and the State Controller's Office, on or before March 31 of each year, a report of the Agency's activities for the preceding calendar year, which report shall include certain financial information required under Idaho Code § 67-1076. This annual report shall be considered at a public meeting to report these findings and take comments from the public.

Additionally, the Agency must comply with certain other reporting requirements as set forth in Idaho Code § 67-1076, the local government registry portal, the tax commission plan repository, *see* Idaho Code § 50-2913, the tax commission's plan modification annual attestation, *see* Idaho Code § 50-2903A. Failure to report the information requested under any of these

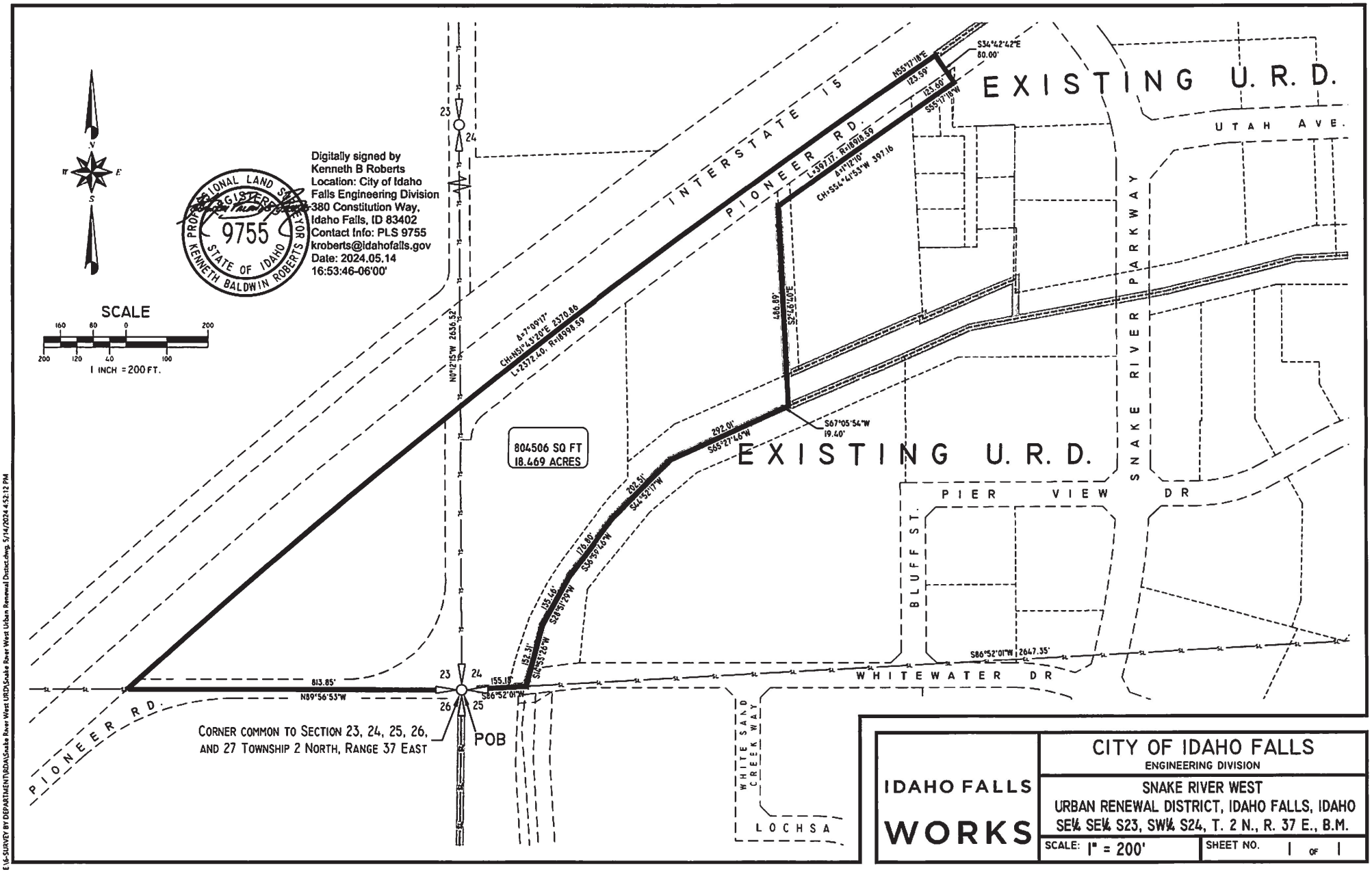
statutes results in significant penalties, including loss of increment revenue, and the imposition of other compliance measures by the Bonneville County Board of County Commissioners.

1200 APPENDICES, ATTACHMENTS, EXHIBITS, TABLES

All attachments and tables referenced in this Plan are attached and incorporated herein by their reference. All other documents referenced in this Plan but not attached are incorporated by their reference as if set forth fully.

Attachment 1

Boundary Map of Snake River West
Urban Renewal Project Area and Revenue Allocation Area



IDAHO FALLS WORKS

CITY OF IDAHO FALLS
ENGINEERING DIVISION

SNAKE RIVER WEST
URBAN RENEWAL DISTRICT, IDAHO FALLS, IDAHO
SE¼ SE¼ S23, SW¼ S24, T. 2 N., R. 37 E., B.M.

SCALE: 1" = 200'

SHEET NO. 1 OF 1

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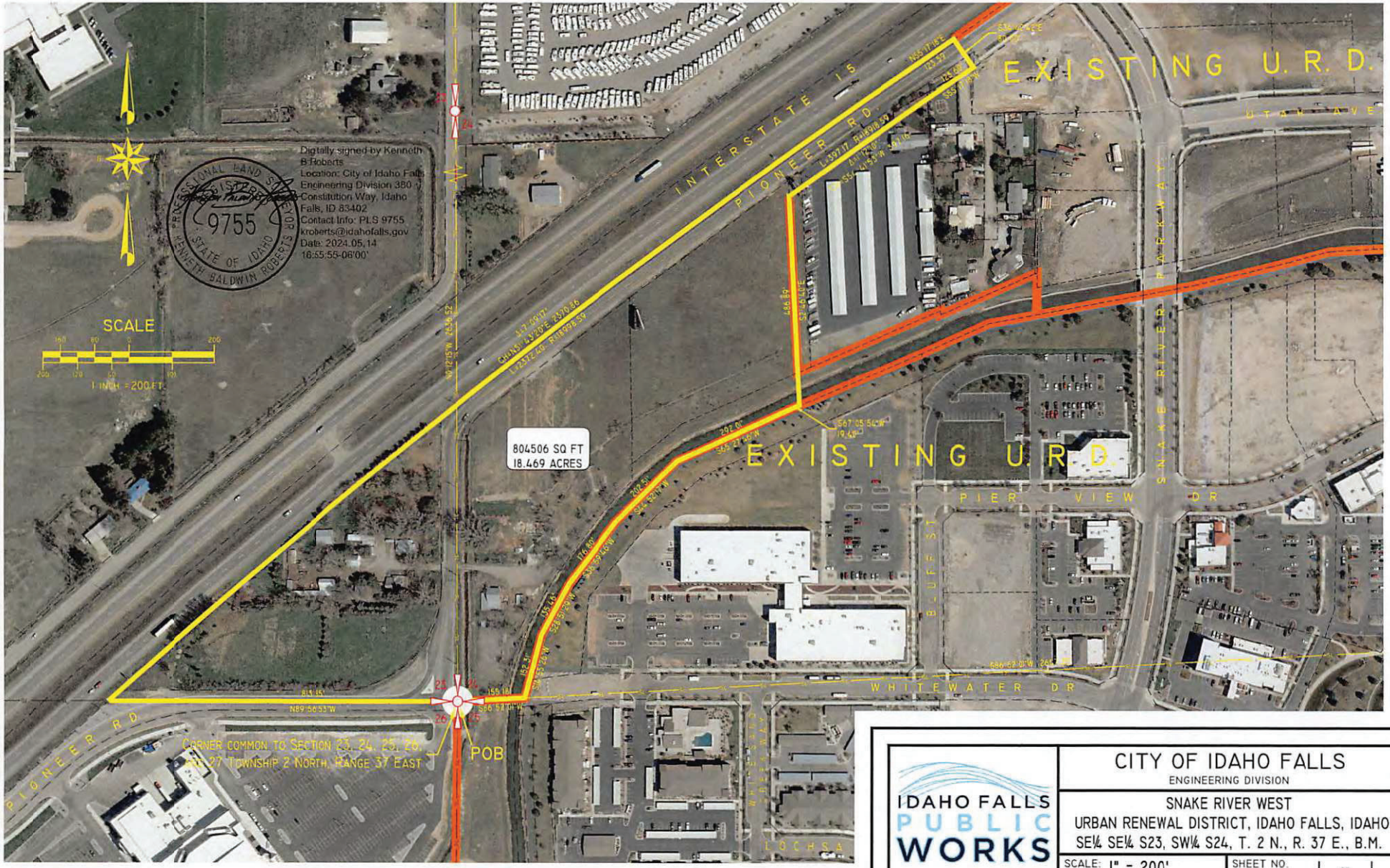

IDAHO FALLS PUBLIC WORKS

CITY OF IDAHO FALLS
ENGINEERING DIVISION

SNAKE RIVER WEST
URBAN RENEWAL DISTRICT, IDAHO FALLS, IDAHO
SE¼ SE¼ S23, SW¼ S24, T. 2 N., R. 37 E., B.M.

SCALE: 1" = 200'

SHEET NO. 1 OF 1

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Attachment 2

Legal Description of Snake River West
Urban Renewal Project Area and Revenue Allocation Area

Attachment _____

DESCRIPTION OF THE PROJECT AREA AND REVENUE ALLOCATION AREA

The Project Area and Revenue Allocation Area are coterminous and generally described as follows:

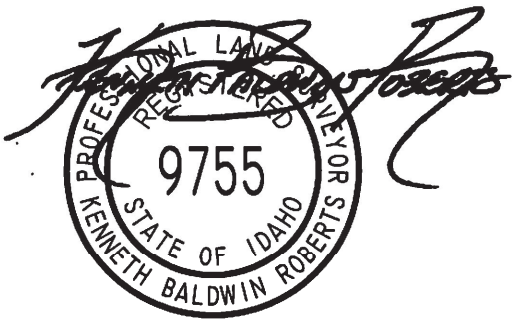
A parcel of land lying in a portion of the southeast quarter of the southeast quarter, (SE¼ SE¼), of Section 23 and the southwest quarter, (SW¼), of Section 24, both areas being within Township 2 North, Range 37 East of the Boise Meridian, Bonneville County, Idaho described as follows:

BEGINNING at the Section Corner common to Sections 23, 24, 25, and 26, Township 2 North, Range 37 East of the Boise Meridian; THENCE along the Section Line common to said Sections 23 and 26 N89°56'53"W 813.85 feet to a point on the Southeasterly Right-of-Way of Interstate 15, said point being a non-tangent curve to the RIGHT; THENCE along said Southeasterly Right-of-Way of Interstate 15 the following two (2) calls:

(1) THENCE Northeasterly along said curve to the RIGHT having a radius of 18998.59 feet, a delta angle of 07°09'17", and whose chord bears N51°43'20"E 2370.86 feet, for an arc distance of 2372.40 feet;

(2) THENCE N55°17'18"E 123.59 feet;

THENCE S34°42'42"E 80.00 feet; THENCE S55°17'18"W 123.60 feet to the point of a non-tangent curve to the LEFT; THENCE along said curve to the LEFT, having a radius of 18918.59 feet, a delta angle of 1°12'10", and whose chord bears S54°41'53"W 397.16 feet, for an arc distance of 397.17 feet; THENCE along a line non-tangent to said previous curve, S02°46'40"E, a distance of 486.89 feet; THENCE S67°05'54"W 19.40 feet; THENCE S65°27'46"W 292.01 feet; THENCE S44°52'17"W 202.51 feet; THENCE S36°59'46"W 176.80 feet; THENCE S28°51'29"W 135.46 feet; THENCE S14°55'26"W 152.31 feet to a point on the Section Line common to said Sections 24 and 25; THENCE S86°52'01"W 155.18 feet along the Section Line common to said Sections 24 and 25 to the **POINT OF BEGINNING**, and containing 18.469 acres, more or less.



Digitally signed by Kenneth B Roberts
Location: City of Idaho Falls Engineering Division 380 Constitution Way, Idaho Falls, ID 83402
Contact Info: PLS 9755 kroberts@idahofalls.gov
Date: 2024.05.14 17:05:01-06'00'

If the electronic signature is not clearly present on this document, it has been modified from its original version and the Surveyor's Seal is no longer valid.

Attachment 3

Private Properties Which May Be Acquired by the Agency

1. The Agency has not identified any particular parcel for the construction of public improvements or for private redevelopment. Properties which may be subject to acquisition include parcels to:

   a) assemble with adjacent parcels to facilitate development and/or redevelopment;
   b) assemble with adjacent rights-of-way to improve configuration and enlarge parcels for development and/or redevelopment;
   c) reconfigure sites for development and possible extension of streets or pathways;
   d) assemble for future transfer to qualified developers to facilitate the development of mixed-use, multi-family residential, retail, office, and commercial facilities; or
   e) assemble for the construction of certain public improvements, including but not limited to streets, streetscapes, water and sewer improvements, natural gas facility improvements, electrical facility improvements, fiber optic improvements, pedestrian/bike paths and trails, and other public facilities.

2. The Agency reserves the right to acquire any additional right-of-way or access routes near or around existing or planned rights-of-way.

3. The Agency reserves the right to acquire property needed to provide adequately sized sites for high priority projects for the development of public improvements (the exact location of which has not been determined).

4. Other parcels may be acquired for the purpose of facilitating catalyst or demonstration projects, constructing public parking, constructing new streets or pathways, enhancing public spaces, or to implement other elements of the urban renewal plan strategy and/or any master plan for the Project Area.

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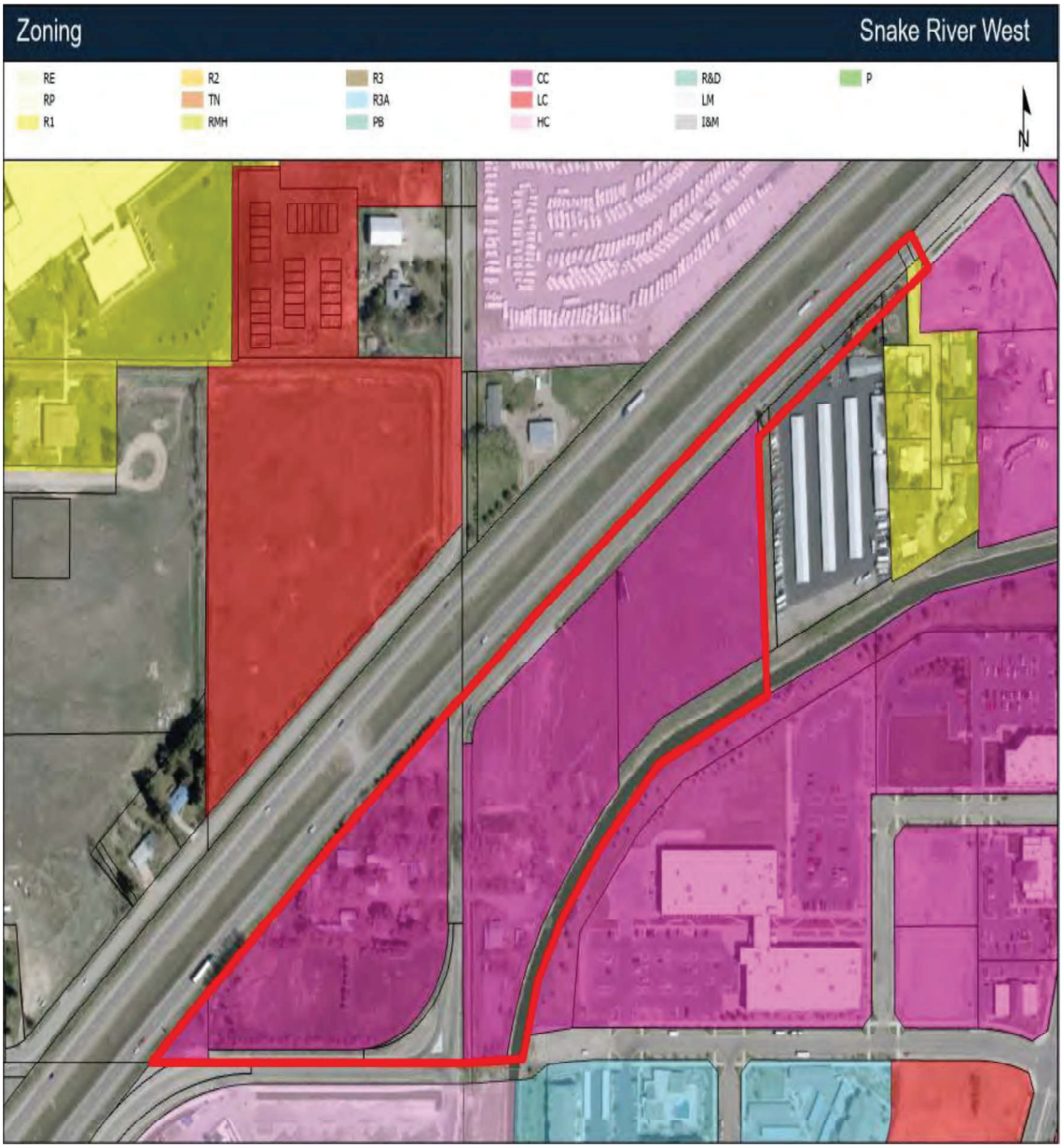
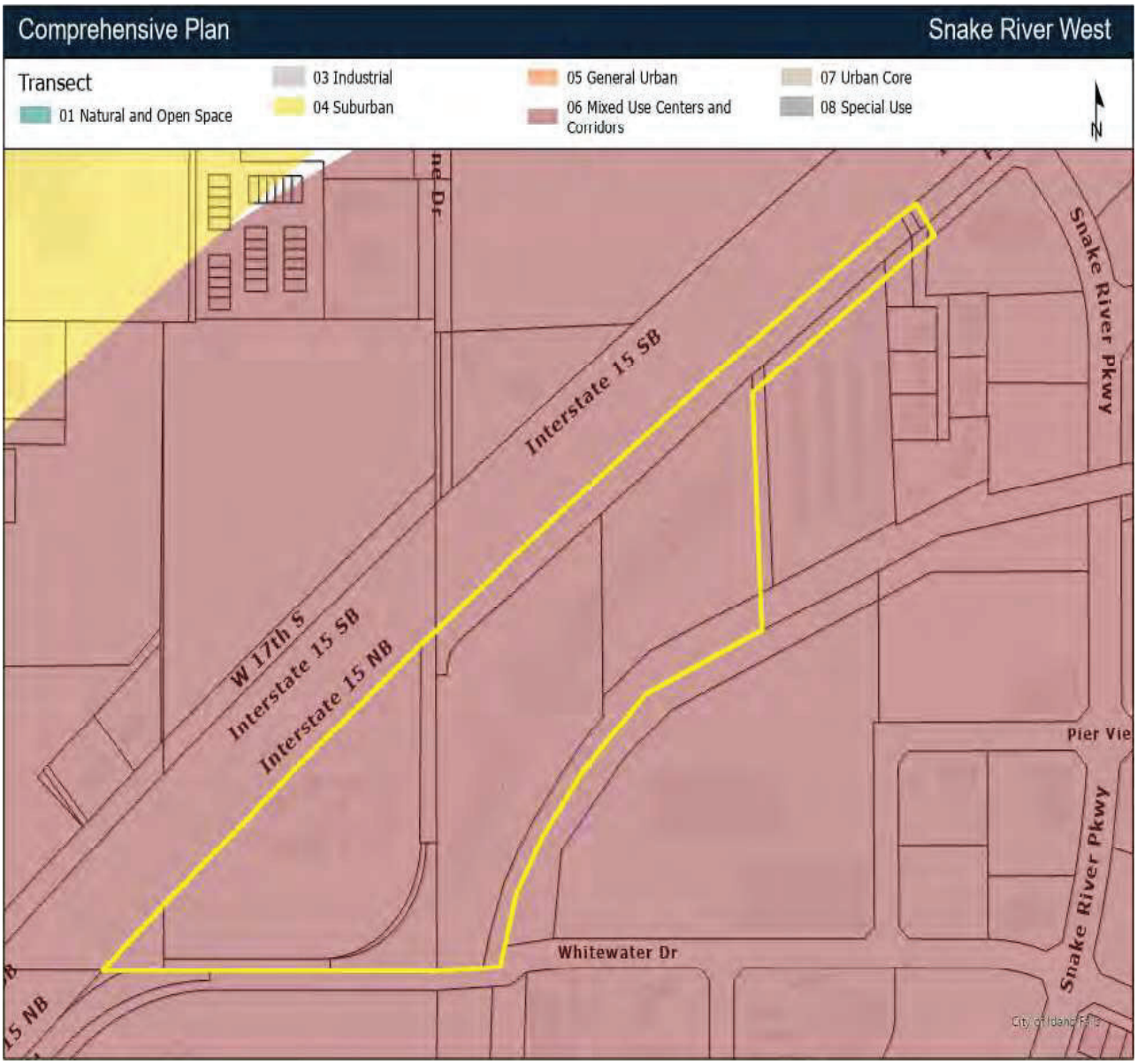
Attachment 4

Map Depicting Expected Land Uses and Current Zoning
Within Revenue Allocation Area and Project Area




Comprehensive Plan
Snake River West
Transect
01 Natural and Open Space
03 Industrial
04 Suburban
05 General Urban
06 Mixed Use Centers and Corridors
07 Urban Core
08 Special Use
N
Interstate 15 SB
W 17th S
Interstate 15 SB
Interstate 15 NB
Snake River Pkwy
Pier Vie
Snake River Pkwy
Whitewater Dr
15 NB
City of Idaho Falls

Attachment 5

Economic Feasibility Study

Attachment 5
Snake River West Urban Renewal District
Economic Feasibility Study

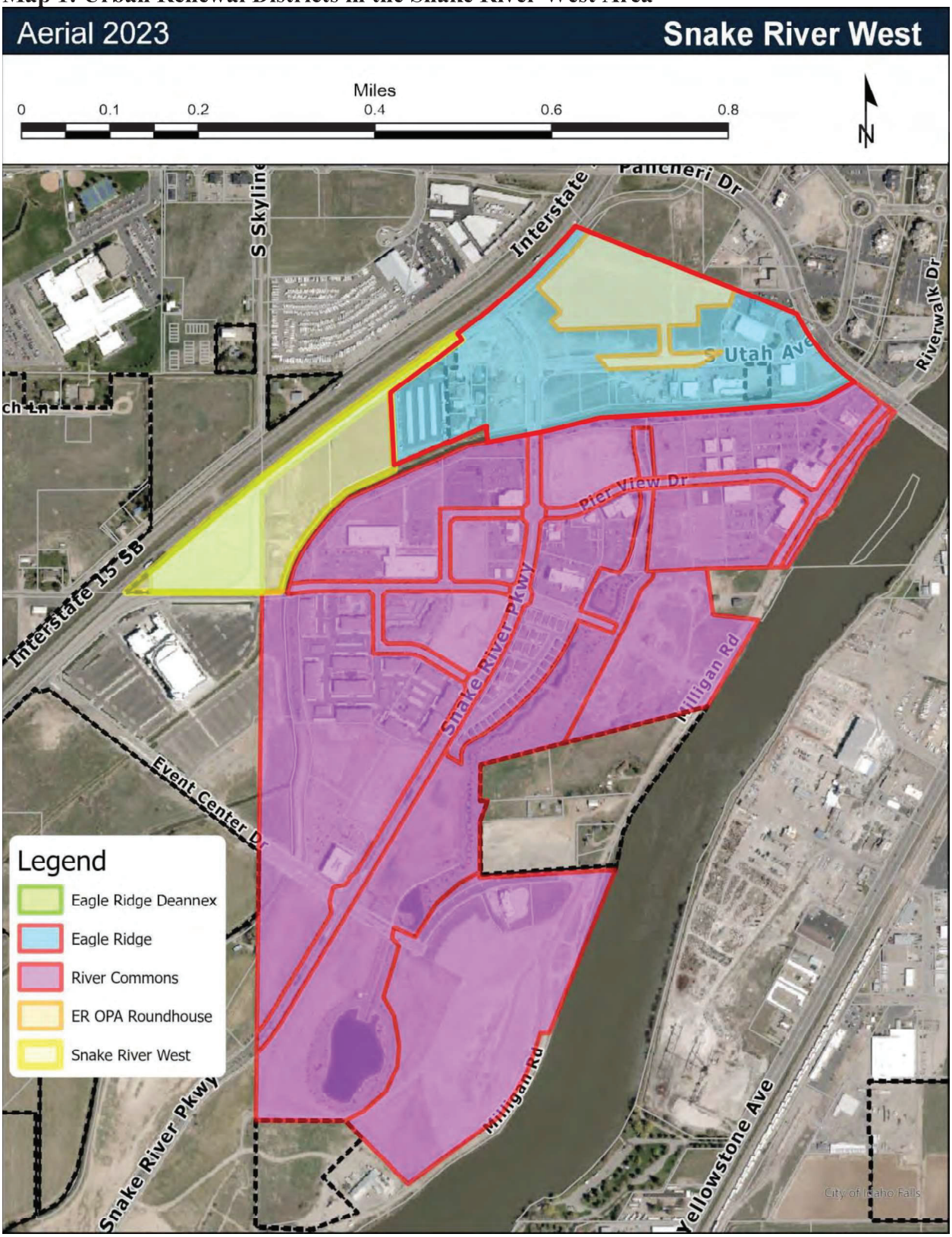
Background

In 2023, the Idaho Falls Redevelopment Agency (Agency) was approached by two developers about participation in two separate multi-family residential projects. One of these projects, the Eagle Ridge Apartments, is partially within the north end of the existing Eagle Ridge Urban Renewal District (Eagle Ridge) boundary. The other project, proposed by US Development included land outside Eagle Ridge as well as a small parcel within the southern end of Eagle Ridge. Both projects presented separate and unique challenges in terms of Agency assistance. To address these challenges, the Agency's board of commissioners authorized pursuit of the following actions:

- A revised Owner Participation Agreement with Eagle Ridge Development, LLC was entered into to redefine and clarify the boundaries and parcels by which tax increment/revenue allocation revenues would be collected to reimburse the developer under the terms of an existing note for public improvements already constructed.
- In support of Roundhouse, the developers of Eagle Ridge Apartments, an owner participation agreement was entered into with Eagle Ridge Project, LLC to address reimbursement for developer funded public improvements eligible for reimbursement, to define the site and to establish the method and percentage of revenues that would be collected and distributed to the developer.
- Consideration of an amendment to the Eagle Ridge Plan to reflect the de-annexation of the southernmost parcel within Eagle Ridge and the segment of Pioneer Road adjacent to said parcel and continuing north to the southern property line of a storage unit development.
- Consideration of the establishment of a new urban renewal district/revenue allocation area called the Snake River West Urban Renewal District (Snake River West), including the US Development proposal and the de-annexed portion of the Eagle Ridge Urban Renewal District.

The original Eagle Ridge boundary, de-annexation area, proposed Snake River West boundary, and adjacent River Commons Urban Renewal District are all shown on Map 1. This study focuses on the fourth bullet in the list above. The purpose of the study is to determine the economic feasibility of the proposed Snake River West project by analyzing if the tax increment revenue from anticipated development in the proposed Snake River West revenue allocation area (RAA) will be sufficient to cover the costs of public improvements and other eligible expenses within the Snake River West Project Area. This report relies on information provided by the developer as well as data provided by staff at the City of Idaho Falls and Bonneville County.

Map 1: Urban Renewal Districts in the Snake River West Area



Project Area and Description

The Snake River West Project Area is located east and adjacent to I-15, north of the Mountain America Event Center, west of the Snake River Landing development, and south of Eagle Ridge. It includes 5 privately held parcels and approximately 2,800 feet of the Pioneer Road right-of-way. Besides the event center, surrounding land uses include mixed-use development to the east, storage units and a hotel to the north, with new apartments being developed to the northeast. The estimated base value of the Snake River West Project Area is $388,053. This number was calculated using 2024 values for all parcels other than a 4.59 acre parcel owned by LLKM Properties, LLC, which used the 2023 value. This is due to a small change in parcel lines which occurred during the writing of this report. The change in parcel lines meant the values for each new section needed to be reappraised by the Bonneville County Assessor's Office, which has not yet occurred.

The developer of Snake River West is US Development. The developer is proposing to build 272 apartment units on the northern parcels with an estimated value of $54,074,945. They are also exploring a 140-unit hotel on the southern parcel. Because the hotel project is still in an exploratory phase, no projected value was provided by the developer. The apartment project is expected to be completed within three years from the start date. As part of the project, the developer will install utilities (water, sewer, fiber, gas, power, etc.) in Pioneer Road and improve the road to include a center turn lane and curb, gutter, and sidewalk on the east side. Additionally, other contemplated public infrastructure improvements associated with the overall project and that benefit the Snake River West District include improvements to Battle Creek as well as improvements to Whitewater bridge and street improvements. These improvements have an estimated cost of approximately $5.6 million according to the developer's engineer. It should be noted, this estimate was not validated by the City's engineer. Other public infrastructure improvements that may be completed in the Snake River District by public entities include improvements to roads, rights-of-way and associated streetscape improvements throughout the District, as well as improvements and enhancements to bicycle and pedestrian amenities. These additional public improvements have an estimated cost of approximately $2,800,000.

Because the main development area and associated right-of-way is adjacent to I-15 with no other private lands adjacent to Pioneer Road, the costs of public improvements must be borne entirely by US Development. In order for the project to be financially viable, the developer has requested assistance from the Agency to fund the public improvements associated with Pioneer Road, and the adjacent right-of-way and streetscape improvements, the accompanying utilities, the improvements to Battle Creek, and the improvements to Whitewater bridge, Whitewater Street, and the adjacent right-of-way and streetscape through tax increment/revenue allocation financing (TIF). It is anticipated that an Owner Participation Agreement (OPA) will be entered into by the developer and the Agency which will include the details of reimbursement. For purposes of this study, it is projected the Agency will reimburse the developer 75% of tax increment revenues collected from the Snake River West Project Area. 10% of the remaining tax increment revenues will be retained by the Agency for administration of the district and the other 15% will be held for potential future public projects. It is anticipated that the district will be in place for the 20-years allowed by Idaho statute. This would not preclude the Agency from closing the district earlier.

Table 1: Project Improvements

Project Improvements	Estimated Cost
Pioneer Road Improvements	$1,444,176
Right-of-Way Improvements	$494,745
Public Utility Improvements	$1,457,287
Battle Creek Improvements	$674,417
Whitewater Bridge Improvements	$1,189,965
Whitewater Street Improvements	$291,004
Total	**$5,551,594**

Economic Feasibility Study Approach

The study reviewed parcels anticipated to see private investment within the Snake River West Project Area. It also evaluated the costs of public improvements identified by the developer and the City. Private development projects reviewed include a 272-unit apartment complex and a 140-unit hotel. Because the hotel is not a confirmed project, the study considered two scenarios. Scenario 1 assumes only the apartments are constructed. Scenario 2 assumes the hotel is also built, and utilizes a recent hotel project in the area rather than developer estimates. Scenario 2 only includes an adjusted cash flow table and analysis following the analysis of Scenario 1. Scenario 2 does not assume an increase in the amount eligible for reimbursement under the OPA.

The tables in this study include reviews of anticipated revenues from the private investment in Snake River West Project Area. Those are followed by anticipated expenses for the Project Area. Finally, Table 6 is a total cash flow for the Project Area. The tables are followed by an analysis of the findings.

Table 2 below is a summary of public infrastructure projects and anticipated costs and timing. Costs for the project are estimated by the developer's engineer. As projects are completed and reimbursement is requested, Agency staff will review invoices and confirm payment of obligations and amounts prior to authorization of reimbursements, subject to specific conditions being met in the OPA. As noted earlier, it is anticipated that the developer will pay for the improvements and reimbursement will occur as outlined in a future OPA.

Table 2: Summary of Anticipated Project Costs and Timing

Project Description	Estimated Cost	Estimated Timing
Pioneer Road Improvements	$1,444,176	2025-2026
Right-of-Way Improvements	$494,745	2025-2026
Public Utility Improvements	$1,457,287	2025-2026
Battle Creek Improvements	$674,417	2025-2026
Whitewater Bridge Improvements	$1,189,965	2025-2027
Whitewater Street Improvements	$291,004	2025-2027
Total	**$5,551,594**	

Table 3 is a list of currently available levy rates for all parcels in the Project Area. These rates are based on the 2023 *Certificate of County Levies for Bonneville County* report provided by City of Idaho Falls staff. The levies are based on each $1.00 market value as determined by the Bonneville County Assessor's office. Although the final version of this report was completed in late 2024, the 2024 levies were still not available at the time of this writing.

Table 3: Current Applicable Levy Rates

Taxing District	Levy Rate
Bonneville County	.002352847
Bonneville County Road & Bridge	.000036090
Idaho Falls	.005404480
School District No. 91	0
Ambulance	.000200786
College of Eastern Idaho	.000083419
Fire District #1	.000529030
Total	0.008606652

Assumptions for Table 4: Snake River West Anticipated Revenues

1. Valuations only include taxable parcels in the proposed Snake River West Project Area.
2. The base value of the parcels de-annexed from Eagle Ridge and included in Snake River West has increased to the current taxable value.
3. Total valuation is assumed to increase 2% per year. Base value assumes no change.
4. Applicable tax levy is assumed to decrease 1% per year.
5. The project valuation increases assume timelines provided by the developer, with values of the project being added to the total valuation two years following anticipated completion of each phase.
6. Reimbursement commences following receipt of certificate of occupancy for buildings in each phase and Agency's receipt of revenue allocation proceeds.
7. Note, it is assumed the Agency will receive revenue allocation proceeds in the year following termination pursuant to the authority set forth in the Idaho Code; however, no revenue for 2046 is shown in the Tables due to pay-off of the OPA.

Table 4: Snake River West Scenario 1 Anticipated Revenues

Year	Base Value	Total Estimated Valuation	Increment Value	Applicable Levy Rate	Estimated Revenue
2025	$ 388,053.00	$ 388,053.00	$ -	0.008606652	$ -
2026	$ 388,053.00	$ 395,814.06	$ 7,761.06	0.008520585	$ 66.13
2027	$ 388,053.00	$ 403,730.34	$ 15,677.34	0.00843538	$ 132.24
2028	$ 388,053.00	$ 16,315,804.95	$ 15,927,751.95	0.008351026	$ 133,013.07
2029	$ 388,053.00	$ 36,522,121.05	$ 36,134,068.05	0.008267516	$ 298,738.97
2030	$ 388,053.00	$ 55,542,163.47	$ 55,154,110.47	0.00818484	$ 451,427.59
2031	$ 388,053.00	$ 56,653,006.74	$ 56,264,953.74	0.008102992	$ 455,914.47
2032	$ 388,053.00	$ 57,786,066.87	$ 57,398,013.87	0.008021962	$ 460,444.69
2033	$ 388,053.00	$ 58,941,788.21	$ 58,553,735.21	0.007941742	$ 465,018.69
2034	$ 388,053.00	$ 60,120,623.97	$ 59,732,570.97	0.007862325	$ 469,636.89
2035	$ 388,053.00	$ 61,323,036.45	$ 60,934,983.45	0.007783702	$ 474,299.74
2036	$ 388,053.00	$ 62,549,497.18	$ 62,161,444.18	0.007705865	$ 479,007.68
2037	$ 388,053.00	$ 63,800,487.13	$ 63,412,434.13	0.007628806	$ 483,761.17
2038	$ 388,053.00	$ 65,076,496.87	$ 64,688,443.87	0.007552518	$ 488,560.64
2039	$ 388,053.00	$ 66,378,026.81	$ 65,989,973.81	0.007476993	$ 493,406.56
2040	$ 388,053.00	$ 67,705,587.34	$ 67,317,534.34	0.007402223	$ 498,299.40
2041	$ 388,053.00	$ 69,059,699.09	$ 68,671,646.09	0.007328201	$ 503,239.61
2042	$ 388,053.00	$ 70,440,893.07	$ 70,052,840.07	0.007254919	$ 508,227.66
2043	$ 388,053.00	$ 71,849,710.93	$ 71,461,657.93	0.00718237	$ 513,264.03
2044	$ 388,053.00	$ 73,286,705.15	$ 72,898,652.15	0.007110546	$ 518,349.21
2045	$ 388,053.00	$ 74,752,439.25	$ 74,364,386.25	0.00703944	$ 523,483.66
				TOTAL	**$ 8,218,292.11**

**The base value was calculated using 2024 values other than a 4.59 acre parcel owned by LLKM Properties, LLC for which only a 2023 value was available due to a modification of parcel lines which occurred during the writing of this report.*

Table 5: Snake River West Scenario 1 Anticipated Expenses

Year	Estimated Revenues	Debt Service (OPA) 75%	OPA Balance	Administration (10% of Revenues)	Fund Carryover for Public Projects
2025	$ -	$ -	$ 5,591,594.00	$ -	$ -
2026	$ 66.13	$ -	$ 5,591,594.00	$ 6.61	$ 59.52
2027	$ 132.24	$ -	$ 5,591,594.00	$ 13.22	$ 178.54
2028	$ 133,013.07	$ 99,759.80	$ 5,491,834.20	$ 13,301.31	$ 20,130.50
2029	$ 298,738.97	$ 224,054.23	$ 5,267,779.97	$ 29,873.90	$ 64,941.34
2030	$ 451,427.59	$ 338,570.69	$ 4,929,209.28	$ 45,142.76	$ 132,655.48
2031	$ 455,914.47	$ 341,935.85	$ 4,587,273.42	$ 45,591.45	$ 201,042.65
2032	$ 460,444.69	$ 345,333.52	$ 4,241,939.91	$ 46,044.47	$ 270,109.35
2033	$ 465,018.69	$ 348,764.01	$ 3,893,175.89	$ 46,501.87	$ 339,862.16
2034	$ 469,636.89	$ 352,227.67	$ 3,540,948.22	$ 46,963.69	$ 410,307.69
2035	$ 474,299.74	$ 355,724.81	$ 3,185,223.42	$ 47,429.97	$ 481,452.65
2036	$ 479,007.68	$ 359,255.76	$ 2,825,967.66	$ 47,900.77	$ 553,303.80
2037	$ 483,761.17	$ 362,820.87	$ 2,463,146.78	$ 48,376.12	$ 625,867.98
2038	$ 488,560.64	$ 366,420.48	$ 2,096,726.30	$ 48,856.06	$ 699,152.08
2039	$ 493,406.56	$ 370,054.92	$ 1,726,671.38	$ 49,340.66	$ 773,163.06
2040	$ 498,299.40	$ 373,724.55	$ 1,352,946.83	$ 49,829.94	$ 847,907.97
2041	$ 503,239.61	$ 377,429.71	$ 975,517.12	$ 50,323.96	$ 923,393.91
2042	$ 508,227.66	$ 381,170.75	$ 594,346.38	$ 50,822.77	$ 999,628.06
2043	$ 513,264.03	$ 384,948.03	$ 209,398.35	$ 51,326.40	$ 1,076,617.67
2044	$ 518,349.21	$ 209,398.35	$ 0.00	$ 51,834.92	$ 1,333,733.60
2045	$ 523,483.66	$ -	$ 0.00	$ 52,348.37	$ 1,804,868.90
Total	**$ 8,218,292.11**	**$ 5,591,594.00**	**$ (0.00)**	**$ 821,829.21**	**$ 1,804,868.90**

**The OPA Balance column includes $40,000 for repayment of fees paid by the developer for preparation of the eligibility report and urban renewal plan*

Table 6: Snake River West Urban Renewal District Scenario 1 Total Cash Flow uses information from the preceding tables to analyze the overall cash flow for the life of the district. The additional assumption it includes is that the Agency will spend funds accumulated for public projects during the last four years of the district to achieve a zero balance

Table 6: Snake River West Urban Renewal District Scenario 1 Total Cash Flow

YEAR	REVENUES	OPA DEBT SERVICE	ADMIN	PUBLIC IMPROVEMENTS	TOTAL EXPENSES	BALANCE
2025	$ -	$ -	$ -		$ -	$ -
2026	$ 66.13	$ -	$ 6.61		$ 6.61	$ 59.52
2027	$ 132.24	$ -	$ 13.22		$ 13.22	$ 178.54
2028	$133,013.07	$ 99,759.80	$ 13,301.31		$ 113,061.11	$ 20,130.50
2029	$298,738.97	$ 224,054.23	$ 29,873.90		$ 253,928.12	$ 64,941.34
2030	$451,427.59	$ 338,570.69	$ 45,142.76		$ 383,713.45	$ 132,655.48
2031	$455,914.47	$ 341,935.85	$ 45,591.45		$ 387,527.30	$ 201,042.65
2032	$460,444.69	$ 345,333.52	$ 46,044.47		$ 391,377.99	$ 270,109.35
2033	$465,018.69	$ 348,764.01	$ 46,501.87		$ 395,265.88	$ 339,862.16
2034	$469,636.89	$ 352,227.67	$ 46,963.69		$ 399,191.36	$ 410,307.69
2035	$474,299.74	$ 355,724.81	$ 47,429.97		$ 403,154.78	$ 481,452.65
2036	$479,007.68	$ 359,255.76	$ 47,900.77		$ 407,156.53	$ 553,303.80
2037	$483,761.17	$ 362,820.87	$ 48,376.12		$ 411,196.99	$ 625,867.98
2038	$488,560.64	$ 366,420.48	$ 48,856.06		$ 415,276.54	$ 699,152.08
2039	$493,406.56	$ 370,054.92	$ 49,340.66		$ 419,395.58	$ 773,163.06
2040	$498,299.40	$ 373,724.55	$ 49,829.94		$ 423,554.49	$ 847,907.97
2041	$503,239.61	$ 377,429.71	$ 50,323.96		$ 427,753.67	$ 923,393.91
2042	$508,227.66	$ 381,170.75	$ 50,822.77	$ 250,000.00	$ 681,993.51	$ 749,628.06
2043	$513,264.03	$ 384,948.03	$ 51,326.40	$ 250,000.00	$ 686,274.43	$ 576,617.67
2044	$518,349.21	$ 209,398.35	$ 51,834.92	$ 500,000.00	$ 761,233.27	$ 333,733.60
2045	$523,483.66	$ -	$ 52,348.37	$ 804,868.90	$ 857,217.27	$ (0.00)

Cash Flow Analysis
Based on the assumptions in the tables, there will likely be sufficient TIF revenues generated from development in Scenario 1 to repay the full anticipated OPA balance. There is also an anticipated balance for use towards additional public improvements for the entire Project Area of approximately$1.8 million. These funds are shown to be paid out over 4 years in Table 6, but they could be spent in other timeframes. In terms of potential public projects for which these funds might be spent, these could include improvements to roads, rights-of-way and associated streetscape improvements throughout the District, as well as improvements and enhancements to bicycle and pedestrian amenities as identified in the City of Idaho Falls' bicycle and pedestrian plan *Connecting our Communities*.

It is important to note again that the assumptions in the Option 1 analysis are intentionally conservative for anticipated revenues and do not include other potential private development projects in the Snake River West Project Area. The study also does not include any other potential sources of revenues such as grants, LIDs, bonds, or others that are potentially available within the Project Area.

As noted earlier in the report, an alternative scenario is possible with the additional development of a 140-unit hotel in the Project Area. Because valuation numbers were not provided for the hotel project, this study relied on the valuation of the My Space Hotel recently completed in the Eagle Ridge Urban Renewal District. The hotel's value listed on the building permit was approximately $7,000,000. Accounting for an estimated 38% rise in construction costs since 2020, for this study, a new hotel was assumed to be valued at $10,000,000. It was also assumed the hotel would be built by 2030 and be added to the total valuation of the Project Area by 2032.

In this scenario, the balance of the OPA is repaid in 2042, two years earlier than Scenario 1. It also provides approximately $1,000,000 more than Scenario 1 for potential additional public improvements. This would mean approximately $2.8 million in potential funds for additional public projects in the area that could be undertaken by either the developer, the City or the Agency. These numbers are shown in Table 7 on the following page.

Table 7: Snake River West Scenario 2 Total Cash Flow

YEAR	REVENUES	OPA DEBT SERVICE	ADMIN	PUBLIC IMPROVEMENTS	TOTAL EXPENSES	BALANCE
2025	$ -	$ -	$ -		$ -	$ -
2026	$ 66.13	$ -	$ 6.61		$ 6.61	$ 59.52
2027	$ 132.24	$ -	$ 13.22		$ 13.22	$ 178.54
2028	$ 133,013.07	$ 99,759.80	$ 13,301.31		$ 113,061.11	$ 20,130.50
2029	$ 298,738.97	$ 224,054.23	$ 29,873.90		$ 253,928.12	$ 64,941.34
2030	$ 451,427.59	$ 338,570.69	$ 45,142.76		$ 383,713.45	$ 132,655.48
2031	$ 455,914.47	$ 341,935.85	$ 45,591.45		$ 387,527.30	$ 201,042.65
2032	$ 540,664.31	$ 405,498.23	$ 54,066.43		$ 459,564.67	$ 282,142.30
2033	$ 546,024.46	$ 409,518.34	$ 54,602.45		$ 464,120.79	$ 364,045.97
2034	$ 551,436.52	$ 413,577.39	$ 55,143.65		$ 468,721.04	$ 446,761.44
2035	$ 556,901.01	$ 417,675.75	$ 55,690.10		$ 473,365.86	$ 530,296.60
2036	$ 562,418.44	$ 421,813.83	$ 56,241.84		$ 478,055.68	$ 614,659.36
2037	$ 567,989.35	$ 425,992.01	$ 56,798.94		$ 482,790.95	$ 699,857.76
2038	$ 573,614.26	$ 430,210.70	$ 57,361.43		$ 487,572.12	$ 785,899.90
2039	$ 579,293.71	$ 434,470.28	$ 57,929.37		$ 492,399.65	$ 872,793.96
2040	$ 585,028.24	$ 438,771.18	$ 58,502.82		$ 497,274.00	$ 960,548.20
2041	$ 590,818.39	$ 443,113.79	$ 59,081.84	$ 350,000.00	$ 852,195.63	$ 699,170.95
2042	$ 596,664.72	$ 346,631.91	$ 59,666.47	$ 350,000.00	$ 756,298.38	$ 539,537.29
2043	$ 602,567.77	$ -	$ 60,256.78	$ 700,000.00	$ 760,256.78	$ 381,848.28
2044	$ 608,528.12	$ -	$ 60,852.81	$ 700,000.00	$ 760,852.81	$ 229,523.59
2045	$ 614,546.33	$ -	$ 61,454.63	$ 782,615.29	$ 844,069.92	$ 0.00

Conclusion

Based on the above, using conservative modeling, the conclusion is the revenue generation from the private development is sufficient to fund the necessary public infrastructure improvements, and related Agency operations costs; therefore, the project is economically feasible.

Limitations to the Feasibility Study

This study is based on information provided by the developers as to estimated valuation of the development and estimates for projects costs. The projects within this study may be modified by changes in estimated construction schedules, including completion dates, the economy of the Idaho Falls region, significant changes in the tax levies, and revisions to applicable legislation. The total project costs and potential tax increment revenues are estimates. Additionally, this report not intended to be an exhaustive list of proposed projects in the Project Area.

Attachment 6

Agricultural Operation Consents

E*xhibit C to the Consents is only included with the first consent to eliminate redundancy*

4879-8240-7418, v. 2

AGRICULTURAL OPERATION CONSENT FORM

COME NOW Tyrell Wall, Member of Cloverland Investments LLC, a Utah limited liability company, and Pamela B. Bridenstine, Manager of Deerfield Holdings LLC, a Utah limited liability company, and state that Cloverland Investments LLC and Deerfield Holdings LLC, own that certain property generally described as Parcel Identification Numbers RPA00007246161 and RPA00007246086 in the real property records of Bonneville County, Idaho, and more particularly described on Exhibit A attached hereto and incorporated herein by reference (the "Property"), and hereby certify:

(1) that the Property has been used, within the last three (3) years, as an agricultural operation; and

(2) that the undersigneds have reviewed the materials provided in Exhibit B and have had an opportunity to review the urban renewal eligibility report entitled Eligibility Report: Snake River West, prepared by Brad Cramer, Perspective Planning & Consulting LLC and as attached hereto as Exhibit C.

Further, Tyrell Wall as Member of Cloverland Investments LLC, and Pamela B. Bridenstine, as Manager of Deerfield Holdings LLC, hereby provide their consent and approval that the subject Property may be included within a proposed urban renewal area and may be deemed appropriate for inclusion within an urban renewal project area as defined by the Idaho Urban Renewal Law of 1965, Chapter 20, Title 50, Idaho Code, as amended, and the Local Economic Development Act, Chapter 29, Title 50, Idaho Code, as amended, as the property possesses certain characteristics of eligibility.

DATED this 11 day of ~~November~~ Dec 2024.

CLOVERLAND INVESTMENTS LLC

Name: Tyrell Wall
Title: Member

DEERFIELD HOLDINGS LLC

Pamela B Bridenstine

Name: Pamela B. Bridenstine
Title: Manager

STATE OF UTAH)

) ss:

County of Davis)

On this 11 day of December 2024, before me, a Notary Public for the state of Idaho, personally appeared Tyrell Wall, known or identified to me to be the Member of the limited liability company, that executed the instrument or the person who executed the instrument on behalf of said limited liability company and acknowledged to me that such limited liability company executed the same.

AMY THOMAS
Notary Public, State of Utah
Commission # 737444
My Commission Expires
8/14/2028

Amy Thomas
Notary Public
My Commission Expires on 8/14/2028

STATE OF UTAH)

) ss:

County of Davis)

On this 11 day of December 2024, before me, a Notary Public for the state of Idaho, personally appeared Pamela B. Bridenstine, known or identified to me to be the Manager of the limited liability company, that executed the instrument or the person who executed the instrument on behalf of said limited liability company and acknowledged to me that such limited liability company executed the same.

AMY THOMAS
Notary Public, State of Utah
Commission # 737444
My Commission Expires
8/14/2028

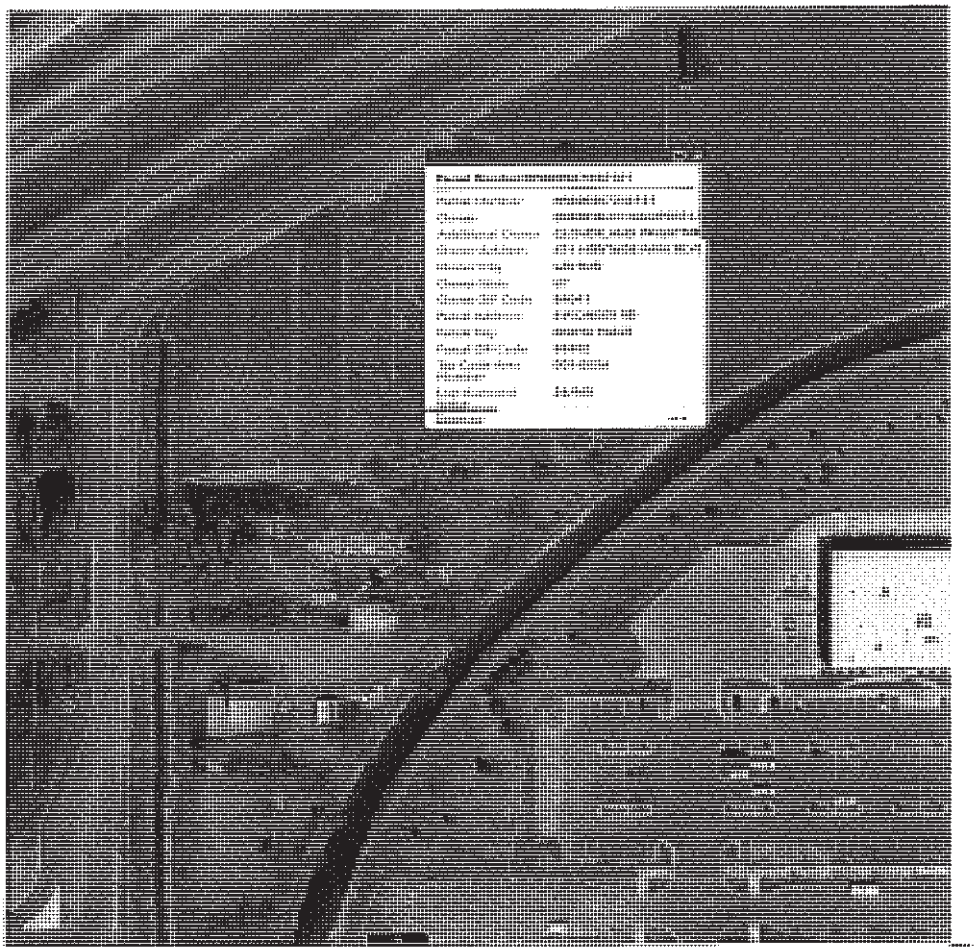
Amy Thomas
Notary Public
My Commission Expires on 8/14/2028

EXHIBIT A

PARCEL NUMBER: RPA00007246161

ADDRESS: S Pioneer Road

DESCRIPTION



PARCEL NUMBER: RPA00007246086
ADDRESS: 1459 S PIONEER RD

DESCRIPTION

EXHIBIT B

EXCERPTS OF STATUTES

IDAHO CODE §§ 50-2018(8) AND (9)

(8) "Deteriorated area" shall mean an area in which there is a predominance of buildings or improvements, whether residential or nonresidential, which by reason of dilapidation, deterioration, age or obsolescence, inadequate provision for ventilation, light, air, sanitation, or open spaces, high density of population and overcrowding, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors is conducive to ill health, transmission of disease, infant mortality, juvenile delinquency, or crime, and is detrimental to the public health,

safety, morals or welfare. Provided however, this definition shall not apply to any agricultural operation, as defined in section 22-4502(2), Idaho Code, absent the consent of the owner of the agricultural operation or to any forest land as defined in section 63-1701(4), Idaho Code, absent the consent of the forest landowner, as defined in section 63-1701(5), Idaho Code, except for an agricultural operation or forest land that has not been used for three (3) consecutive years.

(9) "Deteriorating area" shall mean an area which by reason of the presence of a substantial number of deteriorated or deteriorating structures, predominance of defective or inadequate street layout, faulty lot layout in relation to size, adequacy, accessibility or usefulness, insanitary or unsafe conditions, deterioration of site or other improvements, diversity of ownership, tax or special assessment delinquency exceeding the fair value of the land, defective or unusual conditions of title, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors, substantially impairs or arrests the sound growth of a municipality, retards the provision of housing accommodations or constitutes an economic or social liability and is a menace to the public health, safety, morals or welfare in its present condition and use; provided, that if such deteriorating area consists of open land the conditions contained in the proviso in section 50-2008(d), Idaho Code, shall apply; and provided further, that any disaster area referred to in section 50-2008(g), Idaho Code, shall constitute a deteriorating area. Provided however, this

definition shall not apply to any agricultural operation, as defined in section 22-4502(2), Idaho Code, absent the consent of the owner of the agricultural operation or to any forest land as defined in section 63-1701(4), Idaho Code, absent the consent of the forest landowner, as defined in section 63-1701(5), Idaho Code, except for an agricultural operation or forest land that has not been used for three (3) consecutive years.

IDAHO CODE § 50-2008

50-2008. PREPARATION AND APPROVAL OF PLAN FOR URBAN RENEWAL PROJECT. (a) An urban renewal project for an urban renewal area shall not be planned or initiated unless the local governing body has, by resolution, determined such area to be a deteriorated area or a deteriorating area or a combination thereof and designated such area as appropriate for an urban renewal project.

(b) An urban renewal agency may itself prepare or cause to be prepared an urban renewal plan, or any person or agency, public or private, may submit such a plan to an urban renewal agency. Prior to its approval of an urban renewal project, the local governing body shall submit such plan to the planning commission of the municipality, if any, for review and recommendations as to its conformity with the general plan for the development of the municipality as a whole. The planning commission shall submit its written recommendations with respect to the proposed urban renewal plan to the local governing body within sixty (60) days after receipt of the plan for review. Upon receipt of the recommendations of the

planning commission, or if no recommendations are received within said sixty (60) days, then without such recommendations, the local governing body may proceed with the hearing on the proposed urban renewal project prescribed by subsection (c) hereof.

(c) The local governing body shall hold a public hearing on an urban renewal project, after public notice thereof by publication in a newspaper having a general circulation in the area of operation of the municipality. The notice shall describe the time, date, place and purpose of the hearing, shall generally identify the urban renewal area covered by the plan, and shall outline the general scope of the urban renewal project under consideration.

(d) Following such hearing, the local governing body may approve an urban renewal project and the plan therefor if it finds that (1) a feasible method exists for the location of families who will be displaced from the urban renewal area in decent, safe and sanitary dwelling accommodations within their means and without undue hardship to such families; (2) the urban renewal plan conforms to the general plan of the municipality as a whole; (3) the urban renewal plan gives due consideration to the provision of adequate park and recreational areas and facilities that may be desirable for neighborhood improvement, with special consideration for the health, safety and welfare of children residing in the general vicinity of the site covered by the plan; and (4) the urban renewal plan will afford maximum opportunity, consistent with the sound needs of the municipality as a whole, for the rehabilitation or redevelopment of the urban renewal area by private enterprise: Provided, that if the urban

renewal area consists of an area of open land to be acquired by the urban renewal agency, such area shall not be so acquired unless (1) if it is to be developed for residential uses, the local governing body shall determine that a shortage of housing of sound standards and design which is decent, safe and sanitary exists in the municipality; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe and sanitary housing cause or contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the municipality, or (2) if it is to be developed for nonresidential uses, the local governing body shall determine that such nonresidential uses are necessary and appropriate to facilitate the proper growth and development of the community in accordance with sound planning standards and local community objectives, which acquisition may require the exercise of governmental action, as provided in this act, because of defective or unusual conditions of title, diversity of ownership, tax delinquency, improper subdivisions, outmoded street patterns, deterioration of site, economic disuse, unsuitable topography or faulty lot layouts, the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area.

(e) An urban renewal plan may be modified at any time: Provided that if modified after the lease or sale by the urban renewal agency of real property in the urban renewal project area, such modification may be conditioned upon such approval of the owner, lessee or successor in interest as the urban renewal agency may deem advisable and in any event shall be subject to such rights at law or in equity as a lessee or purchaser, or his successor or successors in interest, may be entitled to assert.

(f) Upon the approval by the local governing body of an urban renewal plan or of any modification thereof, such plan or modification shall be deemed to be in full force and effect for the respective urban renewal area, and the urban renewal agency may then cause such plan or modification to be carried out in accordance with its terms.

(g) Notwithstanding any other provisions of this act, where the local governing body certifies that an area is in need of redevelopment or rehabilitation as a result of a flood, fire, hurricane, earthquake, storm, or other catastrophe respecting which the governor of the state has certified the need for disaster assistance under 42 U.S.C. section 5121, or other federal law, the local governing body may approve an urban renewal plan and an urban renewal project with respect to such area without regard to the provisions of subsection (d) of this section and the provisions of this section requiring a general plan for the municipality and a public hearing on the urban renewal project.

(h) Any urban renewal plan containing a revenue allocation financing provision

shall include the information set forth in section 50-2905, Idaho Code.

IDAHO CODE §50-2903(8)

(8) "Deteriorated area" means:

(a) Any area, including a slum area, in which there is a predominance of buildings or improvements, whether residential or nonresidential, which by reason of dilapidation, deterioration, age or obsolescence, inadequate provision for ventilation, light, air, sanitation, or open spaces, high density of population and overcrowding, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors, is conducive to ill health, transmission of disease, infant mortality, juvenile delinquency, or crime, and is detrimental to the public health, safety, morals or welfare.

(b) Any area which by reason of the presence of a substantial number of deteriorated or deteriorating structures, predominance of defective or inadequate street layout, faulty lot layout in relation to size, adequacy, accessibility or usefulness, insanitary or unsafe conditions, deterioration of site or other improvements, diversity of ownership, tax or special assessment delinquency exceeding the fair value of the land, defective or unusual conditions of title, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors, results in economic underdevelopment of the area, substantially impairs or arrests the sound growth of a municipality, retards the provision of housing accommodations or constitutes an economic or social liability

and is a menace to the public health, safety, morals or welfare in its present condition and use.

(c) Any area which is predominately open and which because of obsolete platting, diversity of ownership, deterioration of structures or improvements, or otherwise, results in economic underdevelopment of the area or substantially impairs or arrests the sound growth of a municipality. The provisions of section 50-2008(d), Idaho Code, shall apply to open areas.

(d) Any area which the local governing body certifies is in need of redevelopment or rehabilitation as a result of a flood, storm, earthquake, or other natural disaster or catastrophe respecting which the governor of the state has certified the need for disaster assistance under any federal law.

(e) Any area which by reason of its proximity to the border of an adjacent state is competitively disadvantaged in its ability to attract private investment, business or commercial development which would promote the purposes of this chapter.

(f) "Deteriorated area" does not mean not developed beyond agricultural, or any agricultural operation as defined in section 22-4502(1), Idaho Code, or any forest land as defined in section 63-1701(4), Idaho Code, unless the owner of the agricultural operation or the forest landowner of the forest land gives written consent to be included in the deteriorated area, except for an agricultural operation or forest land that has not been used for three (3) consecutive years.

EXHIBIT C

ELIGIBILITY REPORT

PERSPECTIVE
PLANNING & CONSULTING

Eligibility Report:
Snake River West

PREPARED BY

Brad Cramer
Perspective Planning & Consulting LLC

ASSISTANCE FROM

Brian Stevens
Planner II/GIS Analyst for the City of Idaho Falls

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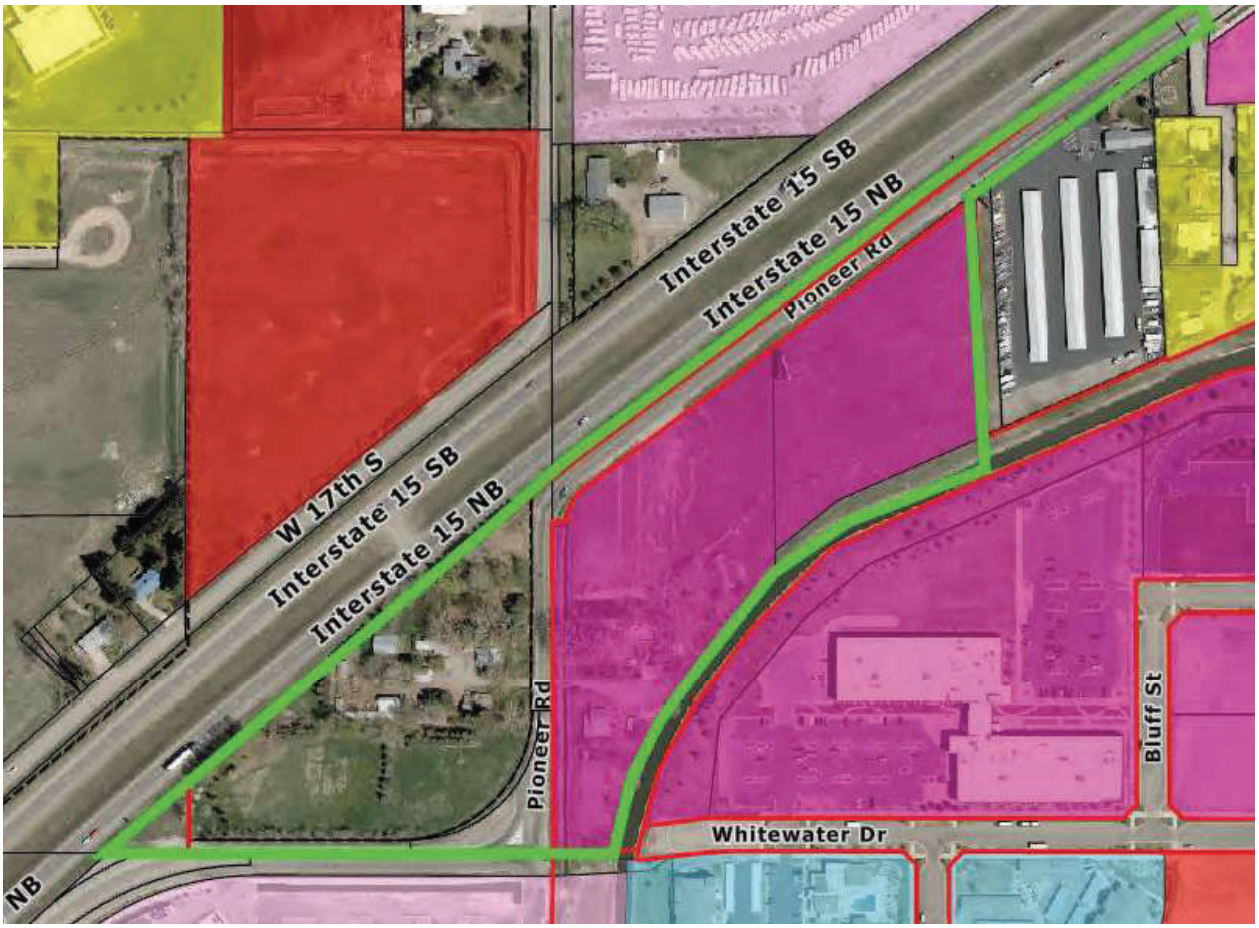
Executive Summary

This report is a review of approximately 17 acres (study area) located between the Snake River and I-15 to determine its eligibility for designation as Urban Renewal Area (URA) and appropriate for an urban renewal project under the Idaho Urban Renewal Law of 1965 and Local Economic Development Act, which are described in more detail in Appendix B.

The proposed name for the new urban renewal/revenue allocation area is Snake River West. The study area is located generally west of the Snake River, east and adjacent to I-15, south of Pancheri Drive, and north of Sunnyside Road. It is west of the River Commons Urban Renewal District. It also includes area currently located within the southern portion of the existing Eagle Ridge Urban Renewal District, an issue described in more detail in the report.

The boundaries of the study area are shown on Map 1. The study area includes only three parcels, and a portion of Pioneer Road. The only street within the study area is Pioneer Road. To simplify references to the main areas of the study area, Map 2 on page 2 labels the northern area as Parcel A and the southern portion as Parcel B.



MAP 1 - PROPOSED SNAKE RIVER WEST BOUNDARY

PARCEL A LOOKING NORTH

MAP 3 - PARCEL LABELS

Because portions of the study area are already included in the Eagle Ridge Urban Renewal District, in order for those lands to be included within the proposed Snake River West Urban Renewal District, they must first be de-annexed from Eagle Ridge. The Idaho Falls Redevelopment Agency (Agency) Board of Commissioners has authorized Agency staff and legal counsel to proceed with an amendment to the Urban Renewal Plan for the Eagle Ridge Urban Renewal Project to deannex those parcels. This process is critical as most of the features which make the study area eligible for the creation of a URA focus on Pioneer Road, which is part of the Eagle Ridge District. Maps 4 and 5 on page 8 depict which area must be de-annexed in relation to both the current Eagle Ridge and proposed Snake River West boundaries..

The Idaho Urban Renewal Law of 1965, which comprises Chapter 20, Title 50 as amended and the Local Economic Development Act, comprising Chapter 29, Title 50 of Idaho Code as amended, outline the statutory criteria for determining whether an area is eligible to be designated as a URA. To be eligible, a site must be determined to be a deteriorating and/or deteriorated area by meeting at least one of these statutory criteria. The review of the study area determined that it meets at least one of the criteria and is, therefore, eligible to be an urban renewal project. A summary of the criteria and whether they are met is included below in Table 1. The full analysis of each criterion is included in the main body of the report.

Table 1

Summary of Findings

CRITERION	CRITERION MET	CHARACTERISTICS SUPPORTING FINDING
Substantial number of deteriorating structures and deterioration of site	✓	This is met via Parcel B only due to deteriorating outbuildings on the site
Age or obsolescence	✓	Parcel B has structures constructed before 1969
Predominance of defective or inadequate street layout	✓	Lack of connection between Whitewater Drive and Pioneer Road is a significant gap in the transportation network. Pioneer Road is also inadequate in terms of improvements requiring a widening to at least three lanes and construction of curb, gutter and sidewalk.
Outmoded street patterns	✓	The S-curve in Pioneer Road creates several safety hazards and access issues.
Need for correlation of area with other areas of by streets and modern traffic requirements	✓	Pioneer Road needs to be widened to at least three lanes and be improved with curb, gutter and sidewalk.
Faulty lot layout	✓	The lots on their own are generally developable, but they are extraordinarily difficult to develop due to large gaps in the utility network. Access to Parcel B is also challenging due to the curvature of Pioneer Road.
Unsuitable topography	✗	There was no evidence that shallow basalt existing in the study area even though it is fairly prevalent in the immediate area.
Insanitary or unsafe conditions	✓	Pioneer Road presents an unsafe condition in several ways. The S-curve presents visibility issues, especially for a collector roadway with higher speeds and for pedestrians. The lack of curb and gutter increase the potential for pooling of water and significant ice patches. Allowed parking on Pioneer Road is unsafe with the current widths and curvature of the roadway.

Table 1

Summary of Findings Cont.

CRITERION	CRITERION MET	CHARACTERISTICS SUPPORTING FINDING
Diversity of ownership	✗	There are only two landowners within the study area.
Tax or special assessment delinquency	✗	This was not evaluated for this report.
Defective or unusual conditions of title	✗	This was not evaluated for this report.
Existence of conditions which endanger life or property	✓	Although some of the structures on Parcel B are deteriorating and not constructed under current building or fire codes, they are not habitable and present only minimal risk. Flooding risk is also minimal other than potentially on one small portion of Parcel A. There are, however, safety concerns for pedestrians on Pioneer, especially along the S-curve.
Impairs or arrests the sound growth of a municipality	✓	There are significant needs to fill gaps in the utility system and improve Pioneer Roadway. Because of the location of I-15, there are no developable parcels to the west of Pioneer Road which puts the full burden of infrastructure costs on fewer landowners, making the study area difficult to develop. Parcel B is also a county island which creates inefficiencies in delivery of services.
Retards development of the area	✓	The conditions noted above have created extraordinary cost burdens required to develop parcels within the study area. This is evidenced by the lack of development despite significant growth in the immediate area.
Economic underdevelopment and economic disuse	✓	See above.

Background Information

Idaho Falls Redevelopment Agency

The Idaho Falls Urban Renewal Agency, also known as the Idaho Falls Redevelopment Agency (Agency) is the urban renewal agency of the City of Idaho Falls. The Mayor, with the confirmation of the City Council, has appointed seven individuals to the Idaho Falls Redevelopment Agency Board of Commissioners:

Lee Radford, *Chair*
Brent Thompson, *Vice-Chair*
Terri Gazdik, *Secretary*
Christopher Harvey
Lisa Burtenshaw
Chris Pelkola Lee
John Walker

The Agency, originally created on July 6, 1966, was re-established by the Mayor and Council on October 20, 1988, for the purpose of eliminating deteriorated and/or deteriorating conditions in the Snake River Urban Renewal District (formerly Lindsay Boulevard Urban Renewal District). The Snake River Urban Renewal District expired in 2018. The Pancheri-Yellowstone Urban Renewal District ("Pancheri District") was terminated after eleven years in 2019. The Agency now administers six urban renewal/revenue allocation areas: River Commons, Eagle Ridge, Jackson Hole Junction, Pancheri East Bank, Anderson Bush and Stanley Boge.

Wade Sanner, Director of Community Development Services (CDS) for the City of Idaho Falls, serves as the Executive Director of the Agency with assistance from Brian Stevens. Elam & Burke, P.A. is the legal counsel. Brad Cramer, with the assistance of the CDS staff, has been engaged to prepare an eligibility report to determine if the Snake River West Study Area meets the criteria for designation as an urban renewal area (URA).

PIONEER ROAD-WHITEWATER LOOKING EAST

BATTLE CREEK CANAL LOOKING NORTHWEST

Urban Renewal Background Information

In response to federal programs funding redevelopment of "blighted" urban areas in the mid-twentieth century, Idaho passed the Idaho Urban Renewal Law of 1965. The law authorized Idaho Municipalities to identify deteriorating areas within their communities and to use federal grant monies to improve and, if necessary, redevelop these areas. Support for such federal expenditures dissipated and eventually ended in the early 1970's. With the loss of federal support, states needed another tool to assist cities to redevelop deteriorating areas and to participate in the economic vitality of their communities.

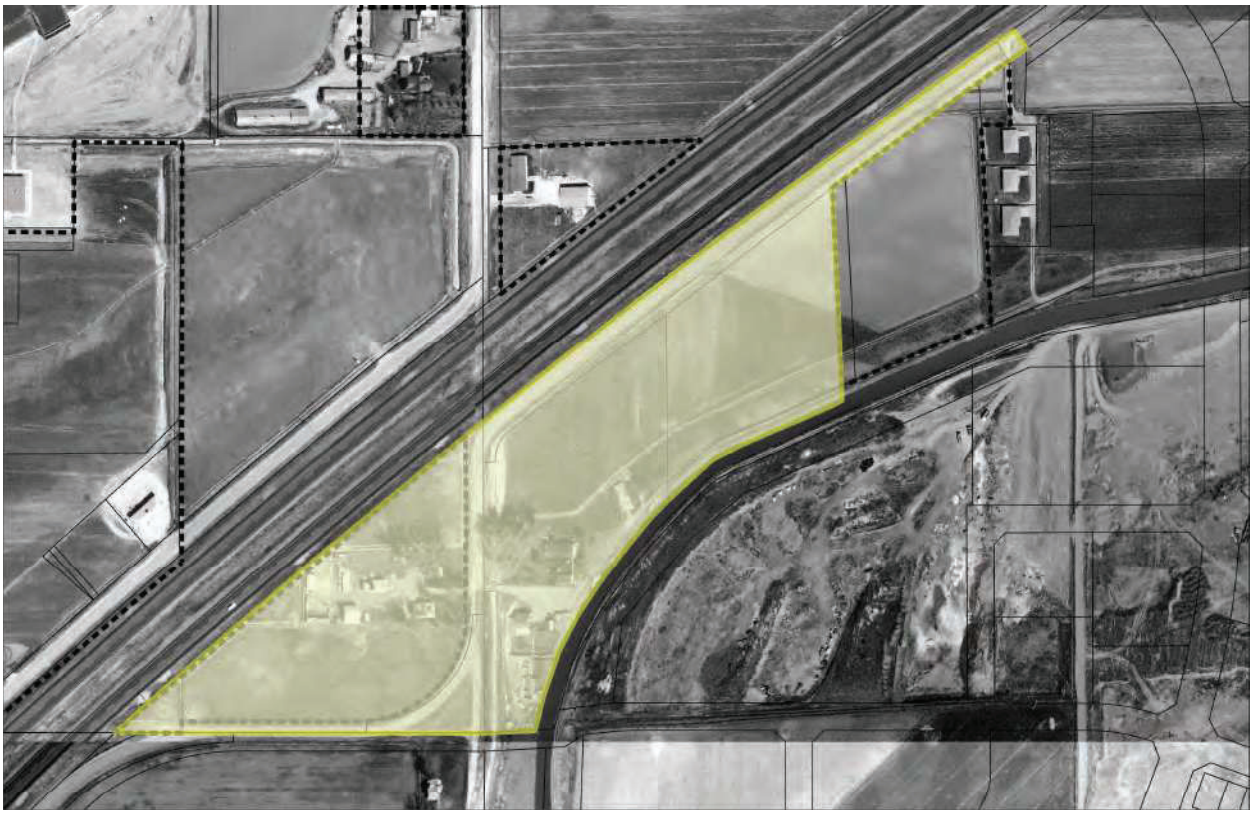
Idaho cities have a significant financial challenge in responding to the infrastructure demands of growth along with the on-going need to maintain the existing physical plant in good repair. Idaho cities face stringent constitutional limitations and near total dependence upon state legislative action to provide funding. An Idaho city's access to funding sources and the ability to employ effective financing mechanisms such as general obligation bonding severely constrain capital investment strategies.

Tools available to cities in Idaho Code Title 50, Chapters 20 and 29, the Urban Renewal Law of 1965 and the Local Economic Development Act, respectively, are some of the few available to assist communities in their efforts to support economic vitality. New sources of State support are not likely to become available in the foreseeable future, thus the Idaho Falls Redevelopment Agency's on-going interest in exploring the potential for establishing additional urban renewal/revenue allocation areas is appropriate.

Purpose of the Report

The purpose of this report is to determine if the Study Area meets the criteria outlined in Idaho statutes, Idaho Code Sections 50-2018(8), (9), and 50-2903(8), for a URA. This report is the first step to assist the Idaho Falls City Council determine if there is a need for creating a URA in a portion or all of the Study Area. To be eligible, a proposed URA need only meet one of the criteria in the statute. A complete list of all steps required to create a URA, and list of eligibility criteria is included in Appendix B.

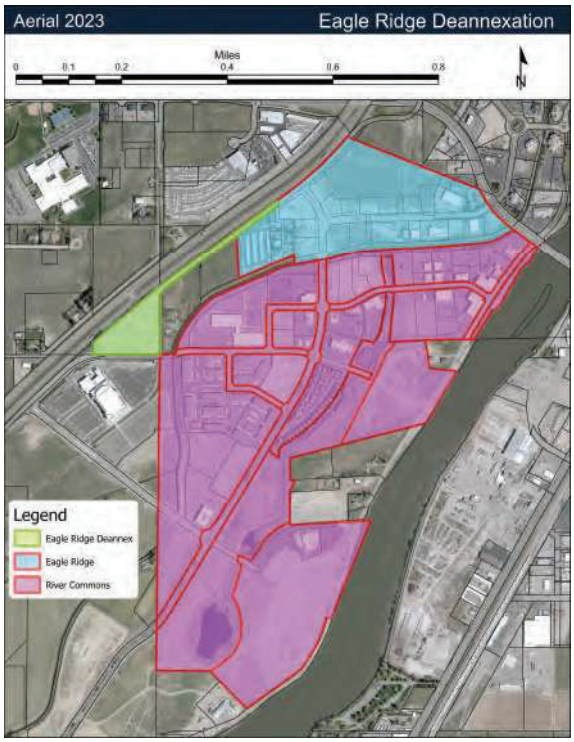
MAP 3-1969 AERIAL PHOTO



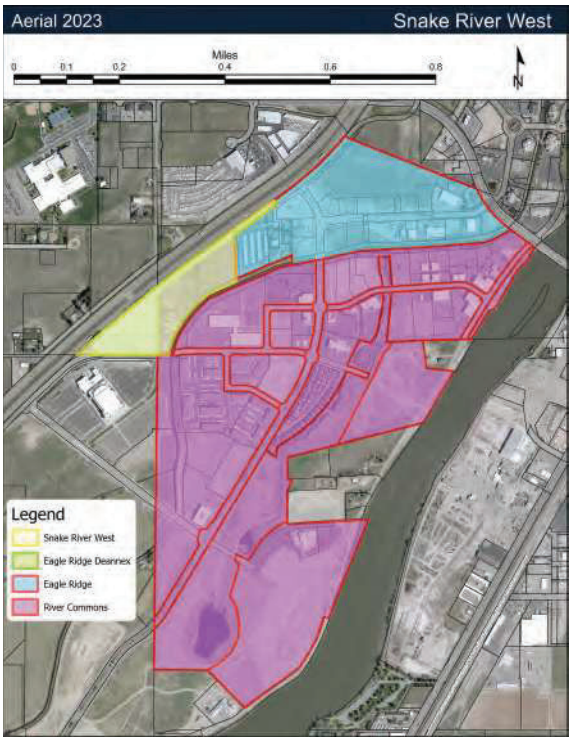
History of the Study Area

The study area includes approximately 17 acres and three parcels bounded by I-15 and Pioneer Road on the northwest and the Porter Canal on the east. Pioneer Road also curves to be the southern boundary of the study area. Based on aerial photos dating back to 1969, which is depicted on Map 3, the study area has historically included only residential or agricultural uses, while areas around it have developed commercially. Snake River Landing, a part of which included within the boundaries the River Commons Urban Renewal District, is a mixed-use development to the east. Prior to being the site for Snake River Landing, lands to the east functioned as a gravel extraction operation. To the south of the study area, the Idaho Falls Auditorium District (IFAD) recently completed the Mountain America Center (MAC), a venue which hosts large events ranging from hockey games to concerts to trade shows. To the immediate northeast, because Porter Canal and I-15 create a narrow strip of land, development has been limited to storage units and a few single-family homes. However, just beyond these uses, a hotel is currently under construction within the Eagle Ridge Urban Renewal District. Other development, including a multi-family housing complex, is also anticipated to begin construction in that area.

MAP 4: DE-ANNEXATION BOUNDARY

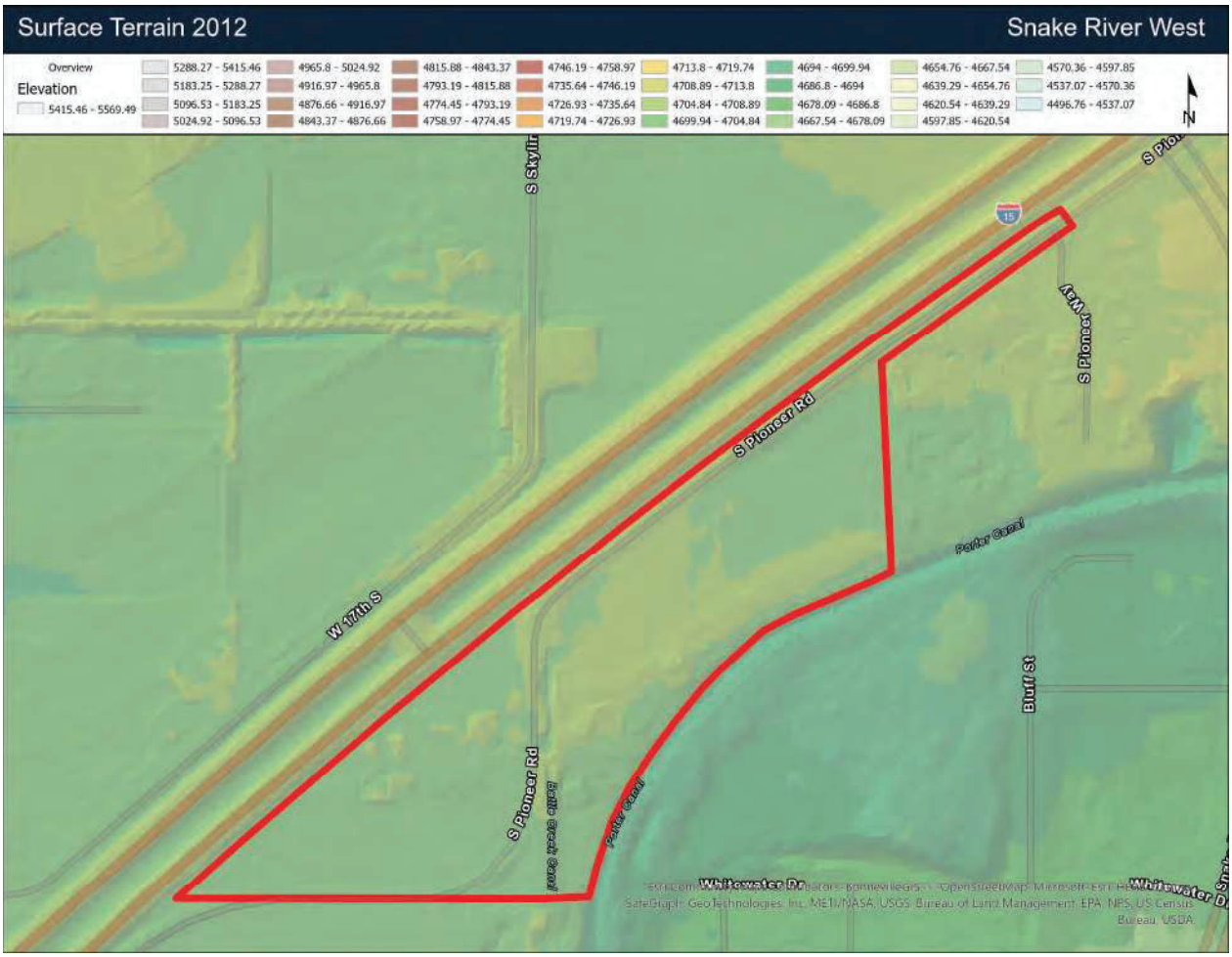


MAP 5: DE-ANNEXATION BOUNDARY WITH PROPOSED NEW BOUNDARY



Although there are three parcels in the study area, because the two largest pieces are under the same ownership, for purposes of this report those two parcels will be referred to as Parcel A. The southern parcel will be referred to as Parcel B. These designations are shown in Map 2 on page 2. This delineation is also important because there are some key differences between the two parcels that necessitate additional explanation and (potentially) process if the Agency pursues the creation of a new urban renewal/revenue allocation area. Parcel B and Pioneer Road are currently included in the Eagle Ridge Urban Renewal District as depicted on Map 4 above. Parcel B and portions of the roadway are also within unincorporated Bonneville County. Parcel A, on the other hand, has been annexed into the City of Idaho Falls and is not part of any other existing urban renewal/ revenue allocation area. It is anticipated that Parcel B will be annexed and zoned in Idaho Falls prior to City Council consideration of an ordinance adopting the Snake River West District urban renewal plan. More importantly, before Parcel B or Pioneer Road can be included in a new URA, they must first be de-annexed from the Eagle Ridge Urban Renewal District pursuant to a plan amendment. For this report, Parcel B and the roadway will be evaluated for eligibility as part of the study area as if de-annexation will occur. If the de-annexation does not occur, the Agency and the City Council may modify the boundary of a future urban renewal/ revenue allocation area accordingly. However, because Pioneer Road plays a significant role in determining eligibility, the final recommendations of this report may need to be adjusted if the roadway is not included in the final boundary.

MAP 6 -SURFACE TERRAIN



Current Conditions In The Study Area

Topography and Geology

Map 6 is a surface terrain map of the study area. The map shows the area and surrounding parcels are generally flat, with some mild changes in elevation. East of Porter Canal, however, the elevation does drop, likely due to years of gravel extraction. Map 7 is a geologic survey map produced by the Idaho Geologic Survey. It identifies this area as Alluvium of Snake River Outwash, which is described as having heavy levels of gravel and sand. While it does not identify areas of shallow basalt, the general area is known to have a large shelf of rock that rises and drops dramatically. To the south, for example, the MAC and its parking lot had to be strategically placed in order to avoid this shallow shelf for the foundation of the building. While it is possible that shallow rock may exist within the study area, there was not a geo-technical study available or any other evidence to confirm where such outcroppings may exist.

Land Uses and Structures

As noted in the history section, lands within the study area have been, and remain, a combination of residential and agricultural uses. However, it does not appear the land has not been farmed for quite some time and currently lies fallow. The areas immediately surrounding the study area have largely developed as commercial and office space, with some single-family residential to the northeast and planned higher density residential further north.

Aerial photos from 1969, which are the earliest available of this area, show residential structures as well as agricultural outbuildings on both parcels. These aerials are also important because there were no records found on construction dates for the buildings, but all existing structures appear on the 1969 photo. The structures include a residence on two of the parcels along with several out-buildings. Based on a site visit in December 2023, all structures on Parcel A have been demolished. On Parcel B, there are two single-family residences which appear to be occupied and at least one trailer home, along with several outbuildings. The residences appear to be in good repair. The trailer home and outbuildings show more obvious signs of age and wear, potentially nearing an unusable condition.

MAP 7-GEOLOGIC SURVEY

I-15 FROM PIONEER ROAD

Streets

Within the study area, there is only one street: Pioneer Road. It begins at the northeast portion of the study area and forms an "S" curve as it progresses to the southwest. Pioneer is identified as a major collector by the Bonneville Metropolitan Planning Organization's (BMPO). Despite this designation and the major development which has recently occurred to the south, this section of Pioneer Road is not improved with curb, gutter or sidewalks and does not have any street lighting. The asphalt appears to be in moderate-to-good condition with some signs of cracking and patching. One area of concern noted at an evening site visit during an event at the MAC, is that vehicles were parked along the north side of Pioneer Road along nearly the entire frontage adjacent to the center. There is no signage to prohibit this, however there is also insufficient width for this to occur safely, especially given the severe lack of visibility as traffic comes around the curves in the road.

In terms of the larger street network, Pioneer connects with Event Center Drive (a collector) and Sunnyside Road (a major arterial) to the south. Sunnyside connects traffic to I-15. To the northeast, Pioneer intersects with Snake River Parkway, which is the main north/south road which runs through Snake River Landing and is identified as a minor arterial. Pioneer then continues northeast and eventually intersects with Utah Avenue (a minor arterial), providing access to a major shopping and office area in the Taylor Crossing, Renaissance Center, and Wal-Mart developments. There are no connections to the west due to I-15. To the east, there is a critical gap in the street network. Pioneer is planned to connect with Whitewater Drive which will cross the Porter Canal, however the required bridge has not yet been constructed. Development that occurs within the study area will likely be required to contribute towards construction of this connecting bridge.

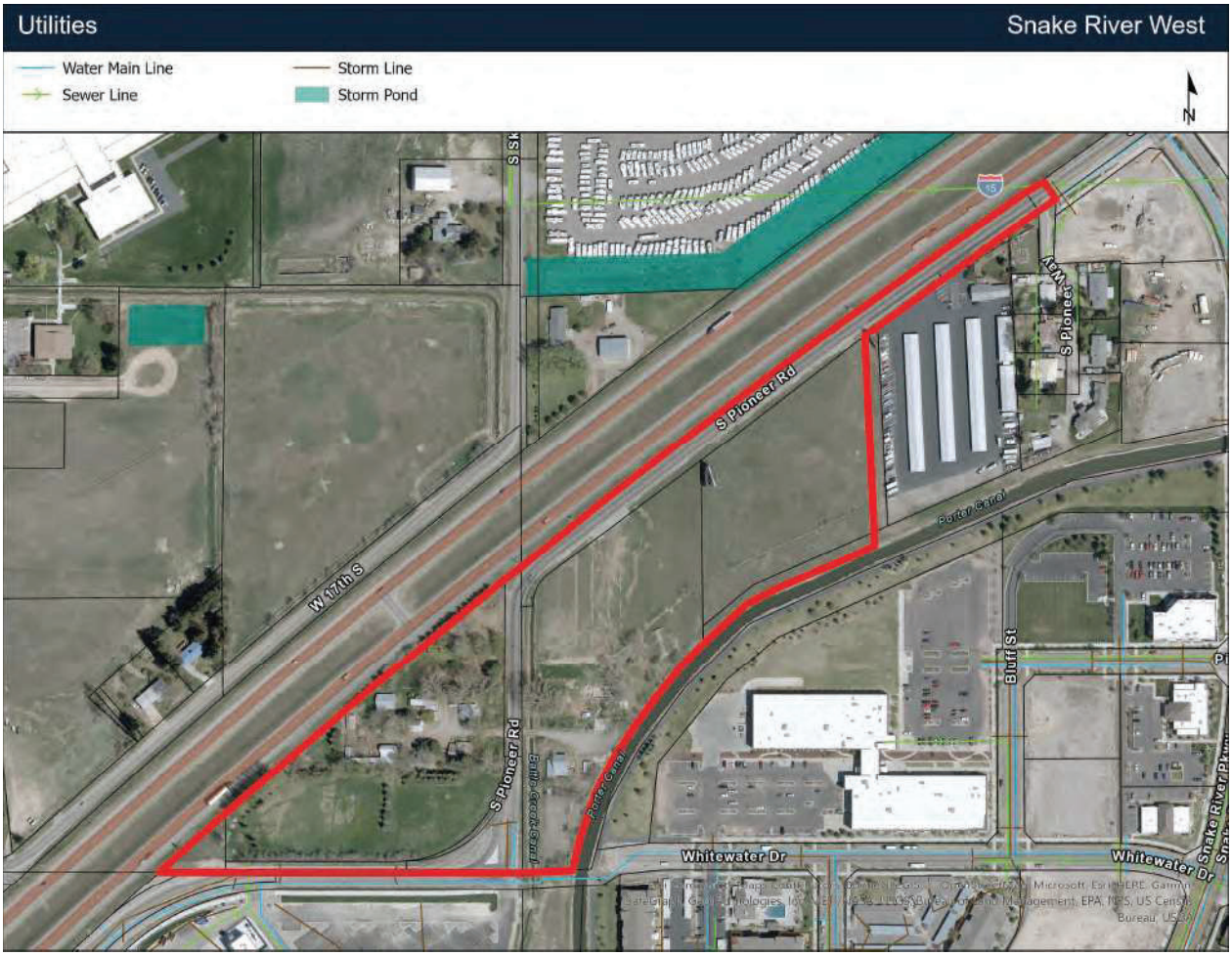
There have been several traffic studies of the area, including the early 2000's when Snake River Landing was first being considered and more recently when the event center property was being platted. The most recent evaluation and update of these studies was conducted by Keller Associates in 2013. Each of the studies have assumed the connection between Whitewater Drive and Pioneer Road with a bridge. The Keller report noted that previous studies had modeled 3-lane roadways on Event Center Drive and Pioneer and that while these are sufficient for the near term, a 4-lane road would serve long terms needs better, especially following events at the MAC. As noted previously, Pioneer Road is currently a 2-lane road section with no curb, gutter or sidewalk. Table 2 is data from the Keller report showing when traffic improvements will be warranted. They indicate completion of the event center would generate enough traffic to warrant turning lane improvements, including on Pioneer Road.

Table 2

Warrants Met for Turn Lane Construction

Intersection	Movement	Horizon Year & Condition			
		2013 Existing	2013 Build	2018 Background	2018 Build
1 Pioneer/Milligan/Utah	WB Left	✗	✗	✗	✗
	WB Right	✗	✗	✗	✗
	EB Right	✗	✓	✗	✓
2 Pancheri/Utah/Crane	NB Right	✓	✓	✓	✓
	SB Right	✗	✗	✓	✓
	WB Right	✓	✓	✓	✓
3 Sunnyside Pioneer	WB Right	✓	✓	✓	✓
5 Pioneer/Event Center	SB Left	✗	✓	✗	✓
	NB Right	✗	Pocket/Taper	✗	Pocket/Taper
	WB Left	✗	✗ *	✗	✗ *
6 Snake River/Event Center	SB Right	✗	✓	✗	✓
	EB Left	✗	✓	✗	✓
Event Center Drive Accesses (All)	NB Right	✗	✓	✗	✓
Pioneer Road Accesses (All)	NB Right	✗	✓	✗	✓

*Even though the traffic analyses show that these left turn lanes are not warranted, changing the assumptions of traffic control used for a sold out even would likely cause volumes to meet this warrant.



MAP 8-UTILITIES

Utilities

Because these parcels were developed in the county and new development has not occurred since annexation, the utility network in the study area is lacking. As shown on Map 8, city sewer only crosses at the northeast boundary to serve a small residential development. This line, when extended to connect with the sewer line to the south at the MAC, will be sufficient to serve development in the area. However, the current gap means there is no available service to Parcel A.

The city water system is more fully developed in the immediate area, but again not within the study area. There is a main water line from the MAC to the south and another line to the northeast which will connect as development occurs along Pioneer Road. The water line from the MAC also continues east to Whitewater Drive and Snake River Landing.

2020 AERIAL PHOTO WITH PROPOSED BOUNDARY

Lot Layout

Although both parcels are relatively large and can accommodate development, there are challenges with the layouts of each. Parcel A, the larger of the two, has sufficient area and depth for modern development. The two challenges are the canals bordering the property and the curvature of the roadway which creates a narrow section of land on the southern end. Porter Canal borders the eastern boundary of Parcel A and the Battle Creek Canal runs along the southwestern frontage. Porter Canal does not present a major barrier to development, but there will be costs associated with burying Battle Creek Canal. Also, because Battle Creek is located on the narrow stretch of land on the south, it further limits the ability to develop that portion of the lot. The combination of the S-curve in Pioneer Road on the west side of the parcel and the curvature of Portal Canal on the east side of the parcel are what cause this narrow section of land. The width and curve may require creativity in placement of buildings on the lot.

For Parcel B, there are similar challenges caused by the curvature of Pioneer Road and the location of I-15 on the western boundary. These two roads not only create an oddly shaped lot, but also impose additional development standards such as landscaping and buffering along all sides of the parcel which will be applied upon annexation and development of the site. In addition, placement of access points for higher traffic producing uses will be challenging due to lack of visibility created by the curves in Pioneer Road. This is exacerbated by the current configuration of the intersection of Pioneer and future Whitewater/access to the MAC parking lot. Currently, there is a stop sign on Pioneer for traffic moving south directly into the parking lot. However, for thru-traffic vehicles do not have to stop, but rather have continuous flow around the curves of Pioneer.

MAP 9-IMAGINE IF FUTURE LAND USE

Idaho Falls Comprehensive Plan and Zoning and Current Uses

Imagine IF: A Plan to Move Idaho Falls Forward Together, which is the city's comprehensive plan, identifies the study area and lands immediately surrounding as "Mixed Use Centers and Corridors." This designation is described below and shown on Map 8:

The Mixed-Use Centers and Corridors Transect denotes areas where people tend to shop, eat and gather. These areas include all housing types but generally at a more intense scale than other areas. These areas also include mixed-use buildings, recreation centers and commercial uses. Mixed-Use Centers and corridors may vary in scale from large, regional commercial centers with supportive housing to smaller commercial pockets called walkable centers that support a well-connected, walkable neighborhood.

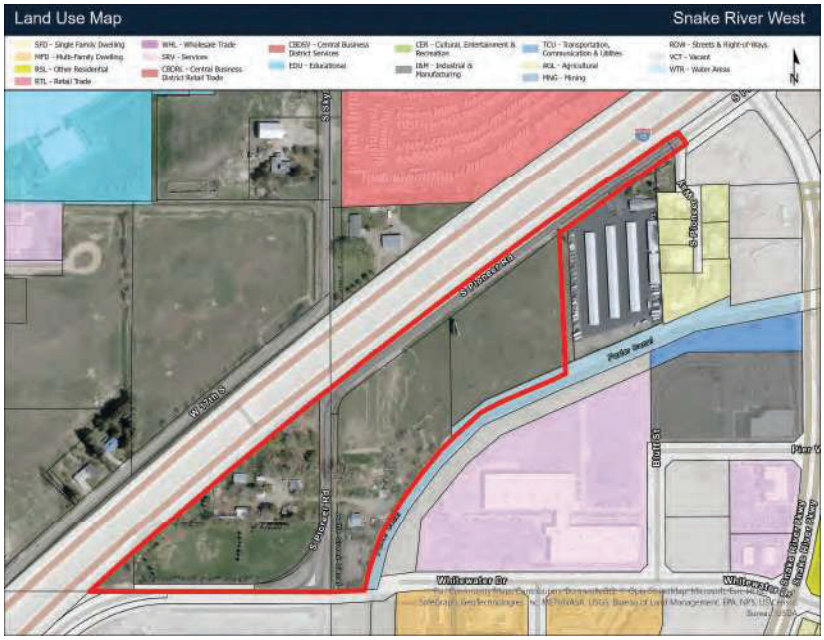
Parcels A is annexed and zoned Central Commercial (CC) as shown on Map 10. This designation is usually reserved for older areas of the city where development occurred with no setbacks. It has been applied on these parcels and in the Snake River Landing to the east to reflect Snake River Landing's objective to build in more of a traditional, dense downtown pattern. This will provide the advantage of having reduced setbacks and higher densities for future development. It is also broad in terms of its allowed uses, providing flexibility to reflect market demands as development occurs.

Parcel B, on the other hand, has not yet been annexed and is zoned A-1 Agricultural Zone in Bonneville County. This zone is much more limited in allowed uses, primarily purposed for large lot residential and agricultural uses. There are some limited commercial uses allowed but are agriculturally focused. As of the writing of this report annexation had not been requested by the applicant. It is anticipated that the parcel will be annexed and zoned prior to City Council consideration of an ordinance adopting an urban renewal plan.

As noted earlier, the study area contains vacant former agricultural land and single-family residential uses. The surrounding area, however, includes a broader diversity of uses as shown on Map 11. These include services, entertainment, light industrial, educational, multi-family residential, single-family residential, and retail. Map 10 does not include use designations for parcels in unincorporated Bonneville County and has not been updated to show the hotel currently under construction on the corner of Pioneer Road and Snake River Parkway. It does demonstrate, however, the economic underdevelopment within the study area.

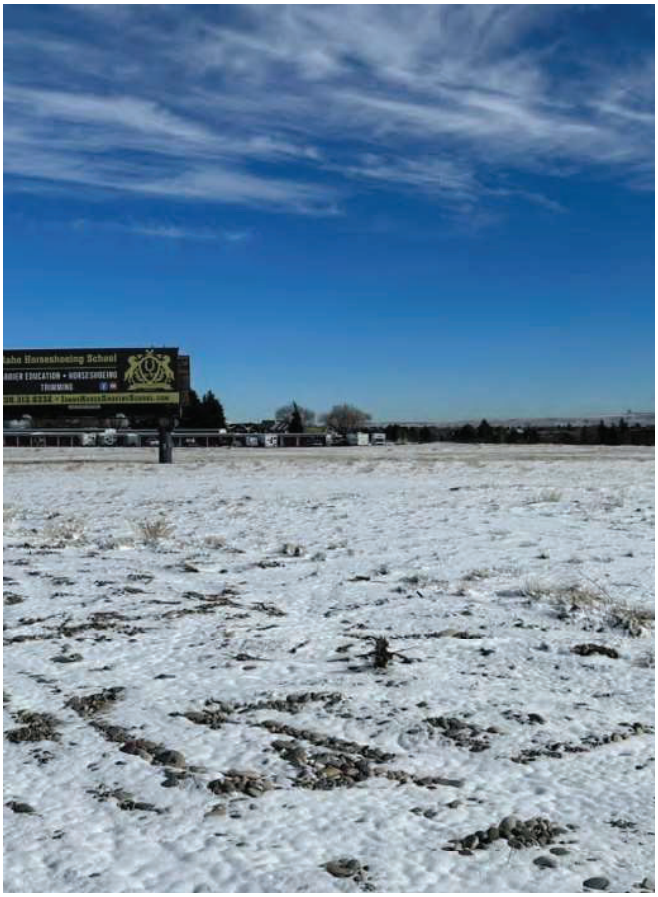
MAP 10-IDAHO FALLS ZONING

MAP 11-CURRENT LAND USES



MOUNTAIN AMERICA CENTER

PARCEL B LOOKING NORTHWEST



PARCEL A LOOKING NORTHEAST

Ten Percent Limitation and Assessed Valuation Within Revenue Allocation Area

In addition to the eligibility criteria discussed in this report, Idaho statutes limit the combined base assessment rolls of the existing and proposed Revenue Allocation Areas (RAAs) to ten percent of the current assessed valuation of all taxable property within the municipality. Idaho Code Section 50-2903(15) states:

> "Revenue allocation area" means that portion of an urban renewal area...where the equalized assessed valuation (as shown on the taxable property assessment rolls) of which the local governing body has determined, on and as a part of the urban renewal plan, is likely to increase as a result of the initiation of an urban renewal project....The base assessment roll or rolls of revenue allocation area or areas shall not exceed at any time ten percent (10%) of the current assessed valuation of all taxable property within the municipality. "

The Data Processing Department of Bonneville County provided the City of Idaho Falls assessed value as well as the adjusted base of the existing RAAs.

Table 2

Statutory Ten Percent Limitation Analysis

AREA	ASSESSED VALUE	PERCENTAGE
City of Idaho Falls	$8,434,935,991	
	ADJUSTED BASE	
River Commons District	$131,823	
Eagle Ridge District*	$7,062,245	
Jackson Hole Junction District	$523,128	
Anderson Bush District	$6,425,722	
Pancheri East Bank District	$6,949,228	
Stanley Boge	$43,456,835	
Yellowstone Square (Proposed District)	$9,533,697	
Snake River West District (Proposed District)	$547,415	
TOTAL ASSESSED BASE URA'S	**$74,630,093**	**0.88%**

SOURCE: Bonneville County Data Processing, August 2023. PM106-2023 Annual Assessed Value, Real Property, Personal Property, Mobile Home. URD055, Urban Renewal by Pin within TAG, August 2023. Yellowstone Square and Northgate Mile assessed values based on Idaho Falls GIS system and Bonneville County Parcel Viewer, 2023.

*Adjusted to show removal of parcels under consideration for the de-annexatwion, which current taxable values are included in the assessed value for the Proposed Snake RIver West District.

The total combined adjusted base assessment rolls of the existing RAAs and the proposed Stanley Boge District, Yellowstone Square District, and Northgate Mile District will not exceed the estimated ten percent limit of $843,493,599. The combined rolls are estimated to be 0.88% using the 2023 assessed values.

Findings

To find a study area is eligible for the creation of a URA and RAA, the Study Area must contain one or more of the statutory criteria spelled out in Idaho Code Sections 50-2018(8), (9), and 50-2903(8), and to the extend there is open land, the statutory criteria in Idaho Code Section 50-2903(8)(c). Below are the criteria and a brief discussion of the findings.

01 The Presence of a Substantial Number of Deteriorated or Deteriorating Structures and Deterioration of the Site

The structures that were on Parcel A have been demolished and the land cleared. On Parcel B, there appear to be four outbuildings that are in a deteriorating state. The trailer home is also in a deteriorating state. The two single family residences appear to be well maintained. The word "substantial" is a subjective term, but here was considered as a percentage of the total number of structures on the site. If Parcel B is included in the final boundary, this criterion is met.

02 Age or Obsolescence

The age of structures pre-date 1969 and likely do not meet modern building and fire codes. This criterion is met.

03 Predominance of Defective or Inadequate Street Layout

Pioneer Road is the only street included within the study area and it is currently part of the Eagle Ridge Urban Renewal District. The S-curve in Pioneer Road is defective in that in creates safety concerns for both vehicles and pedestrians as tra□c volumes increase and visibility is limited. The lack of a connection with Whitewater Drive to the east is inadequate. It was an assumed connection in all tra□c studies considered for this area and will become and ever increasingly important connection as development occurs and tra□c volumes rise. Also, as a major collector, Pioneer Road is inadequate as it is only a county road section with only two lanes, no curb, gutter or sidewalk, and no streetlights. Now that the MAC is completed, analysis from the tra□c studies for that development show Pioneer Road warrants at least a center turn lane and would benefit even further from widening from its current 2-lane configuration to 4-lanes. If Pioneer Road is included in the final boundary, this criterion is met.

04 Outmoded Street Patterns

As was noted in the eligibility report for the Eagle Ridge Urban Renewal District prepared by Kushlan Associates in 2014, the S-curve in Pioneer Road presents tra□c hazards for an area rapidly growing with higher density commercial and residential development. It reduces visibility and, in winter, presents a potential ice hazard as the road carries higher speeds. Also, given the curvature of the road and lack of visibility, it is an outmoded pattern to permit parking on the street, especially during events. Vehicles are traveling at higher speeds and street parking puts pedestrians in the narrow right-ofway without sufficient opportunity to be seen by vehicles coming around the curves. There is also no internal street network that could be used to bypass the curve. If Pioneer Road is included in the final boundary, this criterion is met.

05 Need for Correlation of the Area with Other Areas of Municipality by Streets and Modern Traffic

In general, Pioneer is well connected with the rest of the city. The one, but important, exception to this is the lack of connection to Whitewater Drive to the east. As noted above, this has been an anticipated connection for many years and is increasingly important as development occurs in the area. This criterion is met.

06 Faulty Lot Layout in Relation to Size, Adequacy, Accessibility, or Usefulness; Obsolete Platting

Neither of the parcels have been platted which must occur prior to development. Parcel A is of sufficient size and has adequate access to accommodate modern development but lack of platting reflects its historic agricultural uses, not its readiness for modern development.. While there is a small, narrow portion of the parcel on the southern end that would limit placement of structures, it does not take up enough of the parcel to render the area undevelopable. Parcel B, on the other hand, presents greater difficulty for development. While it does have an odd shape and has not been platted, its buildable area is also reduced because all of its boundaries have frontage on either Pioneer Road or I-15. Accessibility is also challenging for higher traffic uses because of the lack of visibility and curvature of the roadway.

06 Cont.

In terms of usefulness of the lots for development purposes, water and power could serve both properties. Sewer, however, is not available for Parcel A. It is approximately 900 feet from the northern boundary and 450 feet from the southern boundary. Water only exists at the southern end of Parcel A. In order to create the looped system the city typically requires, water will have to be run approximately 2,100 feet and sewer would have to be extended over 2,500 feet to connect with the line to the north. While this is a normal cost of development, the presence of I-15, which disconnects the properties from other developable parcels to the west means that the developer must pay for the full cost of extensions of the utilities as there are no other properties which would contribute to front footage fees, which are used to reimburse developers for a portion of the cost of utility extensions, when such parcels are developed and connect to the lines. This is also an issue for road widening. In normal developments, the city's impact fees pay for the construction of arterial roads but the developer on either side of a roadway is responsible for their half of collectors and local roads. In this case, because there is no other parcel on the west and because Pioneer Road is a collector, the developer will have nearly one-half mile of roadway expenses with no opportunity for cost sharing. This is an unusual circumstance and cost burden for public infrastructure representing a significant impediment to desired development. This criterion is met.

07 Unsuitable Topography

While there are some changes in elevation to the east and the area in the immediate vicinity is known to include shallow basalt, there was no evidence presented or discovered in the analysis that would suggest the topography within the study area is unsuitable for development. This criterion is not met.

08 Insanitary or Unsafe Conditions

There were no insanitary conditions observed on either parcel within the study area. In terms of unsafe conditions, Parcel A shows limited risk, especially with no structures on the site. The highest risk may be limited flooding due to lack of curb and gutter along Pioneer Road.

08 Cont.

Porter Canal, the larger of the two waterways on the property, also presents limited risk and it appears flooding would send water flows to the east due to the topography of the land. Battle Creek Canal on the southern end of Parcel A could present a flooding risk as it is a smaller waterway with less capacity. For Parcel B, the same minimal concerns from flooding apply from Pioneer Road. The outbuildings on the parcel are also aging and likely do not meet current building or fire codes. However, where these do not appear to be continuously occupied by people, it appears the risk is minimal.

The safety concern that does exist within the study area is the layout of Pioneer Road and lack of modern traffic improvements and parking regulations along the right-of-way. As noted above, during events, parking is allowed at least along the north side of Pioneer Road. Not only is the road narrow with insufficient space for safe parking, but because of the curvature of the roadway, especially for southbound traffic, this parking puts pedestrians in the section of right-of-way with the least visibility for motorists. Also, as a collector with higher speeds of travel, the lack of curb and gutter create the risk of pooling and freezing water, which is a hazard on its own, but is exacerbated by the S-curve in Pioneer Road noted under “Outmoded Street Patterns.” This criterion is met.

09 Diversity of Ownership

There are only three property owners within the study area. This criterion is not met.

10 Tax or Special Assessment Delinquency

Taxes and special assessments were not evaluated for this report. This criterion is not met.

11 Defective or Unusual Conditions of Title

Conditions of title were not evaluated for this report. This criterion is not met.

12 Existence of Conditions which Endanger Life or Property by Fire and Other Causes

Similar to the criterion for unsanitary or unsafe conditions, Parcel A does not appear to present conditions which endanger life or property other than perhaps some minimal flooding risk. For Parcel B, aging structures which likely do not meet modern building or fire codes are likely the greatest risk. However, these are not buildings that appear to be regularly occupied and are not eligible to be permanently occupied without significant rehabilitation and therefore the risk is minimal. The major safety risk that does exist is regarding pedestrian traffic on Pioneer Road. Due to low visibility through S-curve,this criterion is met.

13 Substantially Impairs or Arrests the Sound Growth of

Part of the sound growth pattern of a municipality is that city boundaries do not sprawl haphazardly into unincorporated areas of the county. Similarly, when there are county islands surrounded by city development, as is the case with Parcel B, it creates inefficiencies in service deliveries as the county must provide certain services such as police and road maintenance when the city is already providing that same service to properties in the same area. Sound growth patterns also include logical and efficient connections of utilities which create looped systems that are easier to repair and manage. The lack of utilities, roadway improvements, and the county island have persisted in the study area, despite significant economic growth in the immediate area. This is at least in part due to the long stretches of utilities and roadway improvements with no opportunities for cost sharing. This criterion is met.

14 15 Conditions which Retard Development of the Area AND #15 Results in Economic Underdevelopment of the Area & Economic Disuse

The evidence that there are conditions which retard development of the area may be that the study area remains vacant despite the substantial commercial development that has happened in the vicinity. As noted in other sections, the conditions which make the study area more difficult to develop include the large gaps in the utility system and the outmoded roadway pattern on Pioneer Road. Extending utilities, improving Pioneer Road, connecting to Whitewater Drive with a bridge across a substantially sized canal are cost prohibitive in relation to the available developable land and, therefore, returns on investments. Besides these issues, other opportunities to improve the area such as straightening Pioneer Road would take significant public infrastructure investment and reconfiguring of land. It is unlikely opportunities such as this could even be explored without a public private partnership. These criteria are met.

Conclusion

The Snake River West Study Area and proposed RAA meets one or more of the criteria for eligibility under Idaho Code Sections 50-2018(8) and (9) and 50-2903(8). The study area suffers from economic underdevelopment, primarily due to major gaps in the utility system, unimproved roadways, and difficult and disconnected roadway system and traffic pattern, and an extraordinary cost burden due to lack of developable lands on both sides of Pioneer Road and insufficient developable land relative to the costs required. There are certain criteria which are only met if Parcel B or Pioneer Road are included in the final boundary. If the de-annexation of these features from the Eagle Ridge District Urban Renewal District are not completed, this report may need to be reviewed and revised. Table 3, which is also included in the executive summary, summarizes the findings of eligibility for the study area.

PARCEL A LOOKING SOUTHEAST

PARCEL A LOOKING WEST

PARCEL B LOOKING WEST

Table 4

Summary of Findings

CRITERION	CRITERION MET	CHARACTERISTICS SUPPORTING FINDING
Substantial number of deteriorating structures and deterioration of site	✓	This is met via Parcel B only due to deteriorating outbuildings on the site
Age or obsolescence	✓	Parcel B has structures constructed before 1969
Predominance of defective or inadequate street layout	✓	Lack of connection between Whitewater Drive and Pioneer Road is a significant gap in the transportation network. Pioneer Road is also inadequate in terms of improvements requiring a widening to at least three lanes and construction of curb, gutter and sidewalk.
Outmoded street patterns	✓	The S-curve in Pioneer Road creates several safety hazards and access issues.
Need for correlation of area with other areas of by streets and modern traffic requirements	✓	Pioneer Road needs to be widened to at least three lanes and be improved with curb, gutter and sidewalk.
Faulty lot layout	✓	The lots on their own are generally developable, but they are extraordinarily difficult to develop due to large gaps in the utility network. Access to Parcel B is also challenging due to the curvature of Pioneer Road.
Unsuitable topography	✗	There was no evidence that shallow basalt existing in the study area even though it is fairly prevalent in the immediate area.
Insanitary or unsafe conditions	✓	Pioneer Road presents an unsafe condition in several ways. The S-curve presents visibility issues, especially for a collector roadway with higher speeds and for pedestrians. The lack of curb and gutter increase the potential for pooling of water and significant ice patches. Allowed parking on Pioneer Road is unsafe with the current widths and curvature of the roadway.

Table 4

Summary of Findings Cont.

CRITERION	CRITERION MET	CHARACTERISTICS SUPPORTING FINDING
Diversity of ownership	✗	There are only two landowners within the study area.
Tax or special assessment delinquency	✗	This was not evaluated for this report.
Defective or unusual conditions of title	✗	This was not evaluated for this report.
Existence of conditions which endanger life or property	✓	Although some of the structures on Parcel B are deteriorating and not constructed under current building or fire codes, they are not habitable and present only minimal risk. Flooding risk is also minimal other than potentially on one small portion of Parcel A. There are, however, safety concerns for pedestrians on Pioneer, especially along the S-curve.
Impairs or arrests the sound growth of a municipality	✓	There are significant needs to fill gaps in the utility system and improve Pioneer Roadway. Because of the location of I-15, there are no developable parcels to the west of Pioneer Road which puts the full burden of infrastructure costs on fewer landowners, making the study area difficult to develop. Parcel B is also a county island which creates inefficiencies in delivery of services.
Retards development of the area	✓	The conditions noted above have created extraordinary cost burdens required to develop parcels within the study area. This is evidenced by the lack of development despite significant growth in the immediate area.
Economic underdevelopment and economic disuse	✓	See above.

Appendix A:

Additional Site Photos

PIONEER ROAD LOOKING NORTH

PIONEER ROAD LOOKING WEST

PIONEER ROAD-WHITEWATER LOOKING EAST

PIONEER ROAD-WHITEWATER LOOKING NORTH

PIONEER ROAD-WHITEWATER LOOKING SOUTH

SOUTHERN PORTION OF PARCEL A

Appendix B:

Steps in Creating a New Urban Renewal Area & Revenue Allocation Area

Steps in Creating a URA and Revenue Allocation Area

If an urban renewal agency is in existence in in a community, the creation of an urban renewal area, including a revenue allocation area (required for use of tax increment financing), begins with an eligibility report for a designated area within the community. The central question for an eligibility report whether the study area has at least one of the statutory characteristics which must be found to be considered eligible for urban renewal activities. These characteristics or criteria are:

The presence of a substantial number of deteriorated or deteriorating structures and deterioration of site. [50-2018(9), 50-2903(8)(b) and (8)(c), and 50-2008(d)(4)(2)],

2. Age or obsolescence [50-2018(8) and 50-2903(8)(a)],

3. Predominance of defective or inadequate street layout [50-2018(9) and 50-2903(8)(b)],

4. Outmoded street patterns [50-2008(d)(4)(2)],

5. Need for correlation of area with other areas of municipality by streets and modern traffic requirements [50-2008(d)(4)(2)],

6. Faulty lot layout in relation to size, adequacy, accessibility, or usefulness; obsolete platting [50-2018(9), 50-2903(8)(b) and (8)(c)], and 50-2008(d)(4)(2)]

7. Unsuitable topography [50-2008(d)(4)(2)],

8. Insanitary or unsafe conditions [50-2018(9), 50-2903(8)(b)],

9. Diversity of ownership [50-2018(9), 50-2903(8)(b) and (8)(c), and 50-2008(d)(4)(2)],

10. Tax or special assessment delinquency [50-2018(9), 50-2903(8)(b)], and 50-2008 (d)(4)(2)]

11. Defective or unusual conditions of title [50-2018(9), 50-2903(8)(b) and (8)(c), and 50-2008(d)(4)(2)],

12. Existence of conditions which endanger life or property by fire and other causes [50-2018(9), 50-2903(8)(b)],

13. Substantially impairs or arrests the sound growth of a municipality and is a menace to the public health, safety, morals or welfare [50-2018(9), 50-2903(8)(b) and 8(c)],

14. Conditions which retard development of the area [50-2008(d)(4)(2)], and

15. Results in economic underdevelopment of the area [50-2903(8)(b)] and economic disuse [50-2008(d)(4)(2)].

If it is determined the Study Area has characteristics which meet one or more of the statutory criteria listed above, the Agency may accept the eligibility report and request its consideration by the governing body. No URA can be designated as such unless the City Council adopts a resolution finding the area under consideration is deteriorated or deteriorating due to such characteristics, the redevelopment of the area is necessary for the welfare of the residents, and the area is appropriate for an urban renewal project.

The resolution approved by City Council authorizes the Agency to prepare a plan for the proposed urban renewal area. The urban renewal area plan is to include the following with specificity:

A statement describing the total assessed valuation of the base assessment roll of the revenue allocation area and the total assessed valuation of all taxable property within the municipality;

2. A statement listing the kind, number, and location of all proposed public works or improvements within the revenue allocation area;

3. An economic feasibility study;

4. A detailed list of estimated project costs;

5. A fiscal impact statement showing the impact of the revenue allocation area, both until and after the bonds are repaid, upon all taxing districts levying taxes upon property on the revenue allocation area;

6. A description of the methods of financing all estimated project costs and the time when related costs or monetary obligations are to be incurred;

7. Termination date for the plan and revenue allocation area as provided for in section 50-2903(20), Idaho Code. In determining the termination date, the plan shall recognize that the agency shall receive allocation of revenues in the calendar year following the last year of the revenue allocation provision described in the urban renewal plan;

8. A description of the disposition or retention of any assets of the agency upon the termination date. Provided however, nothing herein shall prevent the agency from retaining assets or revenues generated from such assets as long as the agency shall have resources other than revenue allocation funds to operate and manage such assets;

Once the plan is prepared and approved by the Agency, it is forwarded to the City Council. Prior to the public hearing before the City Council, the City Council forwards the plan to the City Planning and Zoning Commission for tis determination that the plan conforms to the City's comprehensive plan. At least thirty (30) days prior to the public hearing, a copy of the notice and plan is distributed to the taxing entities overlapping the boundaries of the proposed district. After receiving the recommendation of the commission, and after notice fully published, the public hearing is held. The City Council must approve an urban renewal plan, including revenue allocation financing provisions, by an ordinance. If the ordinance is adopted by the City Council, a copy of the ordinance with legal description of the Revenue Allocation Area (RAA) is distributed to all the overlapping taxing entities, county officials and the State Tax Commission.

By state statute, following adoption of the ordinance, the base year assessment roll values are fixed as of January 1, of the year in which the ordinance becomes effective. The RAA has a maximum life of twenty years under Idaho statutes. The urban renewal agency implements the plan adopted by the City Council.

Appendix C:

Open Lands Analysis

The study area, particularly Parcel A, has been used for agricultural uses in the past but has lain fallow for many years. There has not been significant development anywhere in the study area as structures have been limited to several small, single-family homes and outbuildings. Parcel A is large enough to support modern development. Parcel B is also large enough, but there are challenges due to the road layout which creates accessibility and safety issues.

Idaho Code Section 50-2903(8)(c) states: "[a]ny area which is predominately open and which because of obsolete platting, diversity of ownership, deterioration of structures or improvements, or otherwise, results in economic underdevelopment of the area or substantially impairs or arrests the sound growth of a municipality. The provisions of section 50-2008(d), Idaho Code, shall apply to open areas."

The eligibility criteria set forth in Idaho Code Section 50-2903(8)(c) for predominantly open land areas mirror or are the same as those criteria set forth in Idaho Code Sections 50-2018(9) and 50-2903(8)(b). "Diversity of ownership" is the same, while "obsolete platting" appears to be equivalent to "faulty lot layout in relation to size, adequacy, accessibility, or usefulness." "Deterioration of structures or improvements" is the same or similar to "a substantial number of deteriorated or deteriorating structures" and "deterioration of site or other improvements." There is also an additional qualification that the provisions of Idaho Code Section 50-2008(d) shall apply to open areas.

Idaho Code Section 50-2008 primarily addresses the urban renewal plan approval process and Idaho Code Section 50-2008(d)(4) sets forth certain conditions and findings for agency acquisition of open land as follows:

> The urban renewal plan will afford maximum opportunity, consistent with the sound needs of the municipality as a whole, for the rehabilitation or redevelopment of the urban renewal area by private enterprise: provided, that if the urban renewal area consists of an area of open land to be acquired by the urban renewal agency, such area shall not be so acquired unless (1) if it is to be developed for residential uses, the local governing body shall determine that a shortage of housing of sound standards and design which is decent, safe and sanitary exists in the municipality; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe and sanitary housing cause or

> contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the municipality, or (2) if it is to be developed for nonresidential uses, the local governing body shall determine that such nonresidential uses are necessary and appropriate to facilitate the proper growth and development of the community in accordance with sound planning standards and local community objectives, which acquisition may require the exercise of governmental action, as provided in this act, because of defective or unusual conditions of title, diversity of ownership, tax delinquency, improper subdivision, outmoded street patterns, deterioration of site, economic disuse, unsuitable topography or faulty lot layouts, the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area.

The urban renewal plan will afford maximum opportunity, consistent with the sound needs of the municipality as a whole, for the rehabilitation or redevelopment of the urban renewal area by private enterprise: provided, that if the urban renewal area consists of an area of open land to be acquired by the urban renewal agency, such area shall not be so acquired unless (1) if it is to be developed for residential uses, the local governing body shall determine that a shortage of housing of sound standards and design which is decent, safe and sanitary exists in the municipality; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe and sanitary housing cause or contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the municipality, or (2) if it is to be developed for nonresidential uses, the local governing body shall determine that such nonresidential uses are necessary and appropriate to facilitate the proper growth and development of the community in accordance with sound planning standards and local community objectives, which acquisition may require the exercise of governmental action, as provided in this act, because of defective or unusual conditions of title, diversity of ownership, tax delinquency, improper subdivision, outmoded street patterns, deterioration of site, economic disuse, unsuitable topography or faulty lot layouts, the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area.

In sum, there is one set of findings if the area of open land is to be acquired and developed for residential uses and a separate set of findings if the land is to be acquired and developed for nonresidential uses.

Basically, open land areas may be acquired by an urban renewal agency and developed for nonresidential uses, including high density residential which is considered a commercial use, if such acquisition is necessary to solve various problems, associated with the land or the infrastructure, that have delayed the area's development. These problems include defective or usual conditions of title, diversity of ownership, tax delinquency, improper subdivisions, outmoded street patterns, deterioration of site, and faulty lot layout. All the stated conditions are included in one form or another in the definition of a deteriorated area and/or a deteriorating area set forth in Idaho Code Sections 50-2903(8)(b) and 50-2018(9). The conditions listed only in Section 50-2008(d)(4)(2) (the open land section) include economic disuse, unsuitable topography, and "the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area."

The conclusion of this discussion concerning open land areas is that the area qualifies if any of the eligibility conditions set forth in Idaho Code Sections 50-2018(9) and 50-2903(8)(b) apply. Alternatively, the area under consideration qualifies if any of the conditions listed only in Idaho Code Section 50-2008(d)(4)(2) apply. As set forth in greater detail above, economic disuse, faulty lot layout; obsolete platting, deteriorating structures, and outmoded road patterns are all conditions which delay development of the Study Area.

Based on the above analysis, while the Study Area does appear to include "predominantly open land," which is not a defined term, and "greenfield" or previous agricultural operations, conditions found within the study area include economic disuse, faulty lot layout; obsolete platting, outmoded road patterns, and deteriorating structures and site improvements, and therefore, the open land condition is satisfied.

PERSPECTIVE
PLANNING & CONSULTING

ELIGIBILITY REPORT:

Snake River West

PREPARED BY

Brad Cramer
Perspective Planning & Consulting LLC

ASSISTANCE FROM

Brian Stevens
Planner II/GIS Analyst for the City of Idaho Falls

AGRICULTURAL OPERATION CONSENT FORM

COMES NOW John Burtenshaw, Manager of LLKM Properties LLC, an Idaho limited liability company, and states that LLKM Properties LLC owns that certain property generally described as Parcel Identification Number RPA00007239688 aka RPA00007239337 in the real property records of Bonneville County, Idaho, and more particularly described on Exhibit A attached hereto and incorporated herein by reference (the "Property"), and hereby certify:

(1) that the Property has been used, within the last three (3) years, as an agricultural operation; and

(2) that the undersigneds have reviewed the materials provided in Exhibit B and have had an opportunity to review the urban renewal eligibility report entitled Eligibility Report: Snake River West, prepared by Brad Cramer, Perspective Planning & Consulting LLC and as attached hereto as Exhibit C.

Further, John Burtenshaw, as Manager of LLKM Properties LLC, hereby provides his consent and approval that the subject Property may be included within a proposed urban renewal area and may be deemed appropriate for inclusion within an urban renewal project area as defined by the Idaho Urban Renewal Law of 1965, Chapter 20, Title 50, Idaho Code, as amended, and the Local Economic Development Act, Chapter 29, Title 50, Idaho Code, as amended, as the property possesses certain characteristics of eligibility.

DATED this 20th day of ~~November~~ December 2024.

LLKM PROPERTIES LLC

John Burtenshaw

Name: John Burtenshaw
Title: Manager

John Burtenshaw

STATE OF IDAHO)
) ss:
County of Bonneville)

On this 20th day of December 2024, before me, a Notary Public for the state of Idaho, personally appeared John Burtenshaw, known or identified to me to be the Manager of the limited liability company, that executed the instrument or the person who executed the instrument on behalf of said limited liability company and acknowledged to me that such limited liability company executed the same.

Amore J Keatu

LENORE KATRI
COMMISSION NO. 17063
NOTARY PUBLIC
STATE OF IDAHO

Notary Public
My Commission Expires on _____

Residing at Idaho Falls, ID
My Commission Expires: 1-30-2027

EXHIBIT A

PARCEL NUMBER: RPA00007239688 aka RPA00007239337

ADDRESS: 1618 S PIONEER RD

DESCRIPTION

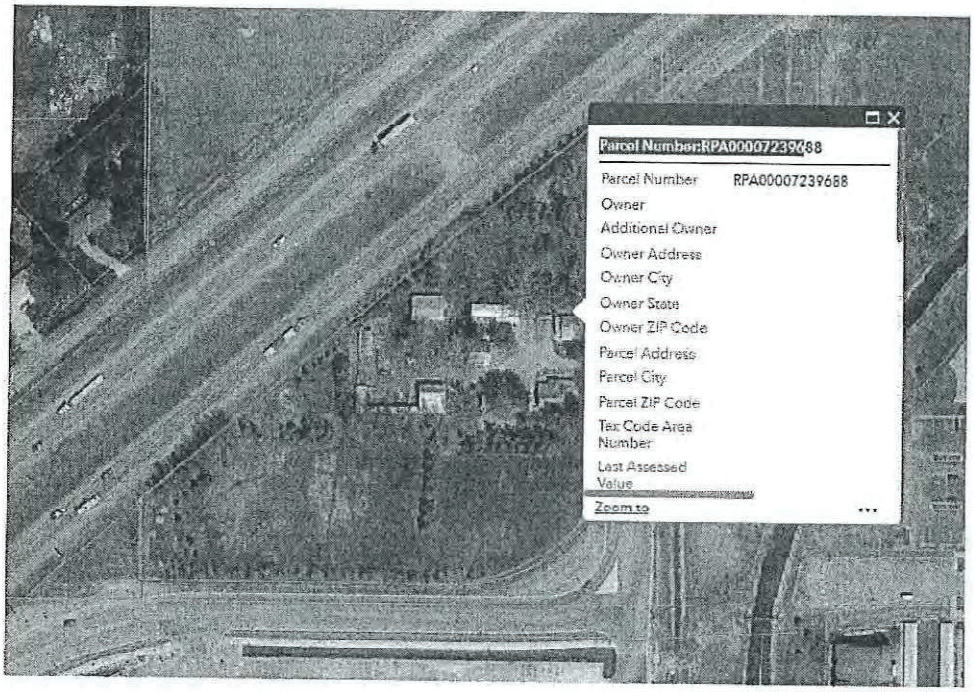


EXHIBIT B

EXCERPTS OF STATUTES

IDAHO CODE §§ 50-2018(8) AND (9)

(8) "Deteriorated area" shall mean an area in which there is a predominance of buildings or improvements, whether residential or nonresidential, which by

reason of dilapidation, deterioration, age or obsolescence, inadequate provision for ventilation, light, air, sanitation, or open spaces, high density of population and overcrowding, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors is conducive to ill health, transmission of disease, infant mortality, juvenile delinquency, or crime, and is detrimental to the public health, safety, morals or welfare. Provided however, this definition shall not apply to any agricultural operation, as defined in section 22-4502(2), Idaho Code, absent the consent of the owner of the agricultural operation or to any forest land as defined in section 63-1701(4), Idaho Code, absent the consent of the forest landowner, as defined in section 63-1701(5), Idaho Code, except for an agricultural operation or forest land that has not been used for three (3) consecutive years.

(9) "Deteriorating area" shall mean an area which by reason of the presence of a substantial number of deteriorated or deteriorating structures, predominance of defective or inadequate street layout, faulty lot layout in relation to size, adequacy, accessibility or usefulness, insanitary or unsafe conditions, deterioration of site or other improvements, diversity of ownership, tax or special assessment delinquency exceeding the fair value of the land, defective or unusual conditions of title, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors, substantially impairs or arrests the sound growth of a municipality, retards the provision of housing accommodations or

constitutes an economic or social liability and is a menace to the public health, safety, morals or welfare in its present condition and use; provided, that if such deteriorating area consists of open land the conditions contained in the proviso in section 50-2008(d), Idaho Code, shall apply; and provided further, that any disaster area referred to in section 50-2008(g), Idaho Code, shall constitute a deteriorating area. Provided however, this definition shall not apply to any agricultural operation, as defined in section 22-4502(2), Idaho Code, absent the consent of the owner of the agricultural operation or to any forest land as defined in section 63-1701(4), Idaho Code, absent the consent of the forest landowner, as defined in section 63-1701(5), Idaho Code, except for an agricultural operation or forest land that has not been used for three (3) consecutive years.

IDAHO CODE § 50-2008

50-2008. PREPARATION AND APPROVAL OF PLAN FOR URBAN RENEWAL PROJECT. (a) An urban renewal project for an urban renewal area shall not be planned or initiated unless the local governing body has, by resolution, determined such area to be a deteriorated area or a deteriorating area or a combination thereof and designated such area as appropriate for an urban renewal project.

(b) An urban renewal agency may itself prepare or cause to be prepared an urban renewal plan, or any person or agency, public or private, may submit such a plan to an urban renewal agency. Prior to its approval of an urban renewal project, the local governing body shall submit such plan

to the planning commission of the municipality, if any, for review and recommendations as to its conformity with the general plan for the development of the municipality as a whole. The planning commission shall submit its written recommendations with respect to the proposed urban renewal plan to the local governing body within sixty (60) days after receipt of the plan for review. Upon receipt of the recommendations of the planning commission, or if no recommendations are received within said sixty (60) days, then without such recommendations, the local governing body may proceed with the hearing on the proposed urban renewal project prescribed by subsection (c) hereof.

(c) The local governing body shall hold a public hearing on an urban renewal project, after public notice thereof by publication in a newspaper having a general circulation in the area of operation of the municipality. The notice shall describe the time, date, place and purpose of the hearing, shall generally identify the urban renewal area covered by the plan, and shall outline the general scope of the urban renewal project under consideration.

(d) Following such hearing, the local governing body may approve an urban renewal project and the plan therefor if it finds that (1) a feasible method exists for the location of families who will be displaced from the urban renewal area in decent, safe and sanitary dwelling accommodations within their means and without undue hardship to such families; (2) the urban renewal plan conforms to the general plan of the municipality as a whole; (3) the urban renewal plan gives due consideration to the provision of adequate park and recreational

areas and facilities that may be desirable for neighborhood improvement, with special consideration for the health, safety and welfare of children residing in the general vicinity of the site covered by the plan; and (4) the urban renewal plan will afford maximum opportunity, consistent with the sound needs of the municipality as a whole, for the rehabilitation or redevelopment of the urban renewal area by private enterprise: Provided, that if the urban renewal area consists of an area of open land to be acquired by the urban renewal agency, such area shall not be so acquired unless (1) if it is to be developed for residential uses, the local governing body shall determine that a shortage of housing of sound standards and design which is decent, safe and sanitary exists in the municipality; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe and sanitary housing cause or contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the municipality, or (2) if it is to be developed for nonresidential uses, the local governing body shall determine that such nonresidential uses are necessary and appropriate to facilitate the proper growth and development of the community in accordance with sound planning standards and local community objectives, which acquisition may require the exercise of governmental action, as provided in this act, because of defective or unusual

conditions of title, diversity of ownership, tax delinquency, improper subdivisions, outmoded street patterns, deterioration of site, economic disuse, unsuitable topography or faulty lot layouts, the need for the correlation of the area with other areas of a municipality by streets and modern traffic requirements, or any combination of such factors or other conditions which retard development of the area.

(e) An urban renewal plan may be modified at any time: Provided that if modified after the lease or sale by the urban renewal agency of real property in the urban renewal project area, such modification may be conditioned upon such approval of the owner, lessee or successor in interest as the urban renewal agency may deem advisable and in any event shall be subject to such rights at law or in equity as a lessee or purchaser, or his successor or successors in interest, may be entitled to assert.

(f) Upon the approval by the local governing body of an urban renewal plan or of any modification thereof, such plan or modification shall be deemed to be in full force and effect for the respective urban renewal area, and the urban renewal agency may then cause such plan or modification to be carried out in accordance with its terms.

(g) Notwithstanding any other provisions of this act, where the local governing body certifies that an area is in need of redevelopment or rehabilitation as a result of a flood, fire, hurricane, earthquake, storm, or other catastrophe respecting which the governor of the state has certified the need for disaster assistance under 42 U.S.C. section 5121, or

other federal law, the local governing body may approve an urban renewal plan and an urban renewal project with respect to such area without regard to the provisions of subsection (d) of this section and the provisions of this section requiring a general plan for the municipality and a public hearing on the urban renewal project.

(h) Any urban renewal plan containing a revenue allocation financing provision shall include the information set forth in section 50-2905, Idaho Code.

IDAHO CODE §50-2903(8)

(8) "Deteriorated area" means:

(a) Any area, including a slum area, in which there is a predominance of buildings or improvements, whether residential or nonresidential, which by reason of dilapidation, deterioration, age or obsolescence, inadequate provision for ventilation, light, air, sanitation, or open spaces, high density of population and overcrowding, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors, is conducive to ill health, transmission of disease, infant mortality, juvenile delinquency, or crime, and is detrimental to the public health, safety, morals or welfare.

(b) Any area which by reason of the presence of a substantial number of deteriorated or deteriorating structures, predominance of defective or inadequate street layout, faulty lot layout in relation to size, adequacy, accessibility or usefulness, insanitary or unsafe conditions, deterioration of site or other improvements, diversity of ownership, tax

or special assessment delinquency exceeding the fair value of the land, defective or unusual conditions of title, or the existence of conditions which endanger life or property by fire and other causes, or any combination of such factors, results in economic underdevelopment of the area, substantially impairs or arrests the sound growth of a municipality, retards the provision of housing accommodations or constitutes an economic or social liability and is a menace to the public health, safety, morals or welfare in its present condition and use.

(c) Any area which is predominately open and which because of obsolete platting, diversity of ownership, deterioration of structures or improvements, or otherwise, results in economic underdevelopment of the area or substantially impairs or arrests the sound growth of a municipality. The provisions of section 50-2008(d), Idaho Code, shall apply to open areas.

(d) Any area which the local governing body certifies is in need of redevelopment or rehabilitation as a result of a flood, storm, earthquake, or other natural disaster or catastrophe respecting which the governor of the state has certified the need for disaster assistance under any federal law.

(e) Any area which by reason of its proximity to the border of an adjacent state is competitively disadvantaged in its ability to attract private investment, business or commercial development which would promote the purposes of this chapter.

(f) "Deteriorated area" does not mean not developed beyond agricultural, or any agricultural operation as defined in section 22-4502(1), Idaho Code, or any forest land as defined in section 63-

1701(4), Idaho Code, unless the owner of the agricultural operation or the forest landowner of the forest land gives written consent to be included in the deteriorated area, except for an agricultural operation or forest land that has not been used for three (3) consecutive years.

EXHIBIT C

ELIGIBILITY REPORT

NOTICE AND PUBLISHED SUMMARY
OF ORDINANCE PURSUANT TO I.C. §50-901(A)

CITY OF IDAHO FALLS ORDINANCE NO. ___

AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, APPROVING THE URBAN RENEWAL PLAN FOR THE SNAKE RIVER WEST URBAN RENEWAL PROJECT, WHICH PLAN INCLUDES REVENUE ALLOCATION FINANCING PROVISIONS; AUTHORIZING THE CITY CLERK TO TRANSMIT A COPY OF THIS ORDINANCE AND OTHER REQUIRED INFORMATION TO COUNTY AND STATE OFFICIALS AND THE AFFECTED TAXING ENTITIES; PROVIDING SEVERABILITY, CODIFICATION, AND PUBLICATION BY SUMMARY; PROVIDING FOR A WAIVER OF THE READING RULES; AND PROVIDING AN EFFECTIVE DATE.

NOW, THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS:

SECTION 1: It is hereby found and determined that:

(a) The Snake River West Project Area as defined in the Snake River West Plan is a deteriorated area or a deteriorating area as defined in the Law and the Act and qualifies as an eligible urban renewal area under the Law and Act.

(b) The rehabilitation, conservation, development and redevelopment of the urban renewal area pursuant to the Snake River West Plan are necessary in the interests of public health, safety, and welfare of the residents of the City.

(c) There continues to be a need for the Agency to function in the City.

(d) The Snake River West Plan conforms to the City's Comprehensive Plan as a whole.

(e) The Snake River West Plan gives due consideration to the provision of adequate park and recreation areas and facilities that may be desirable for neighborhood improvement recognizing the mixed-use, multi-family residential, retail, office, commercial and public components of the Snake River West Plan and the need for public improvements to support the goals of the uses of the area, and shows consideration for the health, safety, and welfare of any children, residents, or businesses in the general vicinity of the urban renewal area covered by the Snake River West Plan.

(f) The Snake River West Plan affords maximum opportunity consistent with the sound needs of the City as a whole for the rehabilitation, development, and redevelopment of the urban renewal area by private enterprises.

(g) Pursuant to Idaho Code §§ 50-2007(h) and 50-2008(d)(l), the Snake River West Plan provides a feasible method for relocation obligations of any displaced families residing within

the Snake River West Project Area and there is not anticipated to be any activity by the Agency that would result in relocation.

(h) The collective base assessment rolls for the Existing Project Areas and the Snake River West Project Area, do not exceed ten percent (10%) of the assessed values of all the taxable property in the City.

(i) The Snake River West Plan includes the requirements set forth in Idaho Code § 50-2905 with specificity.

(j) The Snake River West Plan is sufficiently complete to indicate such land acquisition, demolition and removal of structures, redevelopment, improvements, and rehabilitation as may be proposed to be carried out in the urban renewal area, zoning and planning changes (if any), land uses, maximum densities, building requirements, and any method or methods of financing such plan, which methods may include revenue allocation financing provisions.

(k) The urban renewal area, which includes the deteriorating area, as defined in Idaho Code section 50-2018(9) and Idaho Code section 50-2903(8)(f), does include agricultural operations for which the Agency has received written consent, or which have not been used for agricultural purposes for three (3) consecutive years.

(l) The portion of the Snake River West Project Area which is identified for non-residential uses is necessary and appropriate to facilitate the proper growth and development standards in accordance with the objectives of the Comprehensive Plan to overcome economic disuse, the need for improved traffic patterns, and the need for the correlation of this area with other areas of the City.

(m) The portion of the Snake River West Project Area which is identified for residential uses is necessary and appropriate as there is a shortage of housing of sound standards and design which is decent, safe and sanitary in the City; that the need for housing accommodations has been or will be increased as a result of the clearance of slums in other areas; that the conditions of blight in the area and the shortage of decent, safe and sanitary housing cause or contribute to an increase in and spread of disease and crime and constitute a menace to the public health, safety, morals, or welfare; and that the acquisition of the area for residential uses is an integral part of and essential to the program of the City.

SECTION 2: The City Council finds that the Snake River West Project Area includes open land, that the Agency may acquire any open land within the Snake River West Project Area but does not intend to do so on any widespread basis, and that the Snake River West Project Area is planned to be developed and/or redeveloped in a manner that may include residential and nonresidential uses. Provided, however, the City Council finds that for the portions of the Snake River West Project Area deemed to be "open land," the criteria set forth in the Law and Act have been met.

SECTION 3: The Snake River West Plan, a copy of which is attached hereto and marked as Exhibit 3 and made a part hereof by attachment, be, and the same hereby is approved. As

directed by the City Council, the City Clerk and/or the Agency may make certain technical corrections or revisions in keeping with the information and testimony presented at the March 20, 2025, hearing and incorporate changes or modifications, if any.

SECTION 4: No direct or collateral action challenging the Snake River West Plan shall be brought prior to the effective date of this Ordinance or after the elapse of thirty (30) days from and after the effective date of this Ordinance adopting the Snake River West Plan.

SECTION 5: Upon the effective date of this Ordinance, the City Clerk is authorized and directed to transmit to the Bonneville County Auditor and Bonneville County Assessor, and to the appropriate officials of Bonneville County Board of County Commissioners, City of Idaho Falls, Bonneville County Ambulance, College of Eastern Idaho, Idaho Falls School District No. 91, Bonneville County Road and Bridge, Fire District #1, and the State Tax Commission a copy of this Ordinance, a copy of the legal description of the boundaries of the Revenue Allocation Area, and a map indicating the boundaries of the Snake River West Project Area.

SECTION 6: The City Council hereby finds and declares that the equalized assessed valuation of the Revenue Allocation Area as defined in the Snake River West Plan, is likely to increase as a result of the initiation and completion of urban renewal projects pursuant to the Snake River West Plan.

SECTION 7: The City Council hereby approves and adopts the following statement policy relating to the appointment of City Council members as members of the Agency's Board of Commissioners: If any City Council members are appointed to the Board, they are not acting in an ex officio capacity but, rather, as private citizens who, although they are also members of the City Council, are exercising their independent judgment as private citizens when they sit on the Board. Except for the powers to appoint and terminate Board members and to adopt the Snake River West Plan, the City Council recognizes that it has no power to control the powers or operations of the Agency.

SECTION 8: So long as any Agency bonds, notes or other obligations are outstanding, the City Council will not exercise its power under Idaho Code section 50-2006 to designate itself as the Agency Board.

SECTION 9: This Ordinance shall be in full force and effect immediately upon its passage, approval, and publication and shall be retroactive to January 1, 2025, to the extent permitted by the Act.

SECTION 10: The provisions of this Ordinance are severable, and if any provision of this Ordinance or the application of such provision to any person or circumstance is declared invalid for any reason, such declaration shall not affect the validity of remaining portions of this Ordinance.

SECTION 11: The Summary of this Ordinance, a copy of which is attached hereto as Exhibit 4, is hereby approved.

SECTION 12: All ordinances, resolutions, orders or parts thereof in conflict herewith are hereby repealed, rescinded and annulled.

SECTION 13: Savings Clause. This Ordinance does not affect an action or proceeding commenced or right accrued before this Ordinance takes effect.

SECTION 14: That pursuant to the affirmative vote of one-half (1/2) plus one (1) of the Members of the full Council, the rule requiring two (2) separate readings by title and one (1) reading in full be, and the same is hereby, dispensed with, and accordingly, this Ordinance shall be in full force and effect upon its passage, approval and publication.

PASSED by the City Council of the City of Idaho Falls, Idaho, on this ____ day of March 2025.

APPROVED by the Mayor of the City of Idaho Falls, Idaho, on this _____ day of March 2025.

EXHIBITS TO THE ORDINANCE

Exhibit 1 Resolution of the Planning Commission for the City of Idaho Falls, Idaho, Validating Conformity of the Urban Renewal Plan for the Snake River West Urban Renewal Project with the City of Idaho Falls' Comprehensive Plan (PC Resolution 01-2025)

Exhibit 2 Notice Published in the *Post Register*

Exhibit 3 Urban Renewal Plan for the Snake River West Urban Renewal Project

Exhibit 4 Ordinance Summary

SUMMARY OF SNAKE RIVER WEST PLAN

The Urban Renewal Plan for the Snake River West Urban Renewal Project ("Snake River West Plan") was prepared by the Urban Renewal Agency of the City of Idaho Falls, Idaho, also known as the Idaho Falls Redevelopment Agency ("Agency") pursuant to the Idaho Urban Renewal Law of 1965, Chapter 20, Title 50, Idaho Code, as amended (the "Law"), the Local Economic Development Act, Chapter 29, Title 50, Idaho Code, as amended (the "Act"), and all applicable laws and ordinances and was approved by the Agency. The Snake River West Plan provides for the Agency to undertake urban renewal projects pursuant to the Law and the Act. The Snake River West Plan contains a revenue allocation financing provision pursuant to the Act that will cause property taxes resulting from any increases in equalized assessed valuation in excess of the equalized assessed valuation as shown on the original base assessment roll as of January 1, 2025, to be allocated to the Agency for urban renewal purposes. The duration of the Snake River West Plan is twenty (20) years, recognizing the Agency will receive revenue allocation proceeds in the year following termination. The Plan includes a termination process.

The general scope and objectives of the Snake River West Plan are:

a. The engineering, design, installation, construction, and/or reconstruction of storm water management infrastructure to support compliance with federal, state, and local regulations for storm water discharge and to support private development;

b. The provision for participation by property owners and developers within the Project Area to achieve the objectives of this Plan;

c. The engineering, design, installation, construction, and/or reconstruction of the transportation network within the Project Area, including all streets and streetscapes within the Project Area, with a focus on enhancements to Pioneer Road and related right-of-way improvements, including pedestrian facilities, curb and gutter improvements;

d. The engineering, design, installation, construction, and/or reconstruction of sidewalks and related pedestrian facilities, curb, gutter and streetscapes throughout the Project Area, which for purposes of this Plan, the term streetscapes includes sidewalks, lighting, landscaping, benches, signage, wayfinding, bike racks, public art, and similar amenities between the curb and right-of-way line; and other public improvements, including multi-use pathways for bicycles and pedestrians;

e. The engineering, design, installation and/or construction of the Whitewater Bridge crossing the Porter Canal and the Whitewater Street Extension, including but not limited to related right-of-way improvements, including pedestrian facilities, curb and gutter improvements, and streetscapes;

f. The engineering, design, installation, construction, and/or reconstruction of utilities including but not limited to sewer system improvements and upgrades, water system improvements and upgrades; improvements to fiber optic, natural gas and power facilities;

g. The engineering, design, installation, construction, and/or reconstruction of a portion of the Battle Creek Canal to support site development;

h. The engineering, design, installation, construction, and/or reconstruction of bicycle and pedestrian amenities;

i. Removal or relocation of underground utilities;

j. The acquisition of real property for public right-of-way improvements and pedestrian facilities to encourage development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers;

k. The acquisition of real property for utility undergrounding and streetscape

improvements to create development opportunities consistent with the Plan, including but not limited to future disposition to qualified developers and for qualified developments, including economic development;

l. The disposition of real property through a competitive process in accordance with this Plan, Idaho law, including Idaho Code § 50-2011, and any disposition policies adopted by the Agency;

m. The removal of certain infrastructure for public rights-of-way, pedestrian facilities, utility undergrounding and streetscape improvements to encourage and enhance transportation and mobility options, decrease underutilized parcels, to eliminate unhealthful, unsanitary, or unsafe conditions, eliminate obsolete or other uses detrimental to the public welfare or otherwise to remove or to prevent the spread of deteriorating or deteriorated conditions;

n. The management of any property acquired by and under the ownership and control of the Agency;

o. The development or redevelopment of land by private enterprise or public agencies for uses in accordance with this Plan;

p. The provision of financial and other assistance to encourage a mix of uses in the Project Area consistent with the Comprehensive Plan;

q. The rehabilitation of structures and improvements by present owners, their successors, and the Agency;

r. The preparation and assembly of adequate sites for the development and construction of facilities for uses consistent with the Comprehensive Plan;

s. In collaboration with property owners and other stakeholders, working with the City to amend zoning regulations (if necessary) and standards and guidelines as needed to support implementation of this Plan;

t. In conjunction with the City, the establishment and implementation of performance criteria to assure high site design standards and environmental quality and other design elements which provide unity and integrity to the entire Project Area, and leveraging such development to achieve public objectives and efficient use of scarce resources;

u. To the extent allowed by law, lend or invest federal funds to facilitate development and/or redevelopment;

v. The provision for relocation assistance to displaced Project Area occupants, as required by law, or within the discretion of the Agency Board for displaced businesses;

w. Other related improvements to those set forth above as further set forth in Attachment 5.

Any such land uses as described in the Snake River West Plan will be in conformance with zoning for the City and City's Comprehensive Plan, Imagine IF, A Plan to Move Idaho Falls Forward Together, as amended, as adopted by the City Council. Land made available will be developed by private enterprises or public agencies as authorized by law. The Snake River West Plan identifies various public and private improvements which may be made within the Snake River West Project Area.

The Snake River West Project Area and Revenue Allocation Area herein referred to is generally described as follows:

> An area within the City consisting of approximately 18.469 acres in size, generally located west of the Snake River, east and adjacent to I-15, south of Pancheri Drive, and north of Sunnyside Road. The area, generally referred to as Snake River West is more particularly described below:

A parcel of land lying in a portion of the southeast quarter of the southeast quarter, (SE¼ SE¼), of Section 23 and the southwest quarter, (SW¼), of Section 24, both areas being within Township 2 North, Range 37 East of the Boise Meridian, Bonneville County, Idaho described as follows:

BEGINNING at the Section Corner common to Sections 23, 24, 25, and 26, Township 2 North, Range 37 East of the Boise Meridian; THENCE along the Section Line common to said Sections 23 and 26 N89°56'53"W 813.85 feet to a point on the Southeasterly Right-of-Way of Interstate 15, said point being a non-tangent curve to the RIGHT; THENCE along said Southeasterly Right-of-Way of Interstate 15 the following two (2) calls:

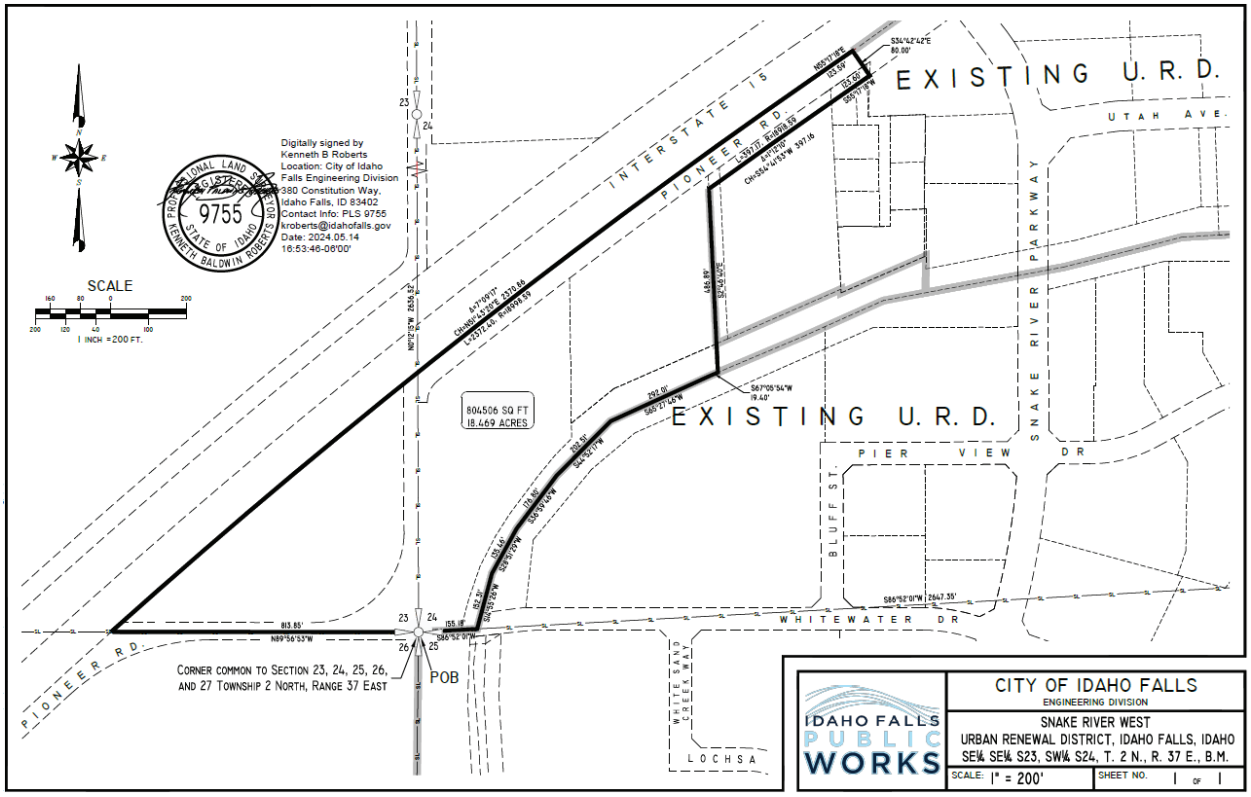
(1) THENCE Northeasterly along said curve to the RIGHT having a radius of 18998.59 feet, a delta angle of 07°09'17", and whose chord bears N51°43'20"E 2370.86 feet, for an arc distance of 2372.40 feet;

(2) THENCE N55°17'18"E 123.59 feet;

THENCE S34°42'42"E 80.00 feet; THENCE S55°17'18"W 123.60 feet to the point of a non-tangent curve to the LEFT; THENCE along said curve to the LEFT, having a radius of 18918.59 feet, a delta angle of 1°12'10", and whose chord bears S54°41'53"W 397.16 feet, for an arc distance of 397.17 feet; THENCE along a line non-tangent to said previous curve, S02°46'40"E, a distance of 486.89 feet; THENCE S67°05'54"W 19.40 feet; THENCE S65°27'46"W 292.01 feet; THENCE S44°52'17"W 202.51 feet; THENCE S36°59'46"W 176.80 feet; THENCE S28°51'29"W 135.46 feet; THENCE S14°55'26"W 152.31 feet to a point on the Section Line common to said Sections 24 and 25; THENCE S86°52'01"W 155.18 feet along the Section Line common to said

Sections 24 and 25 to the **POINT OF BEGINNING**, and containing 18.469 acres, more or less.

The Project Area is also depicted in the map below:



Section 100 includes an introduction, general procedures of the Agency, necessary procedures, the history and current conditions of the Project Area, as well as the purpose of activities, and open land criteria.

Section 200 references the boundaries of the Project Area.

Section 300 discusses the proposed redevelopment actions, participation opportunities and agreements, cooperation with public bodies, property acquisition standards and requirements, relocation, demolition, and property disposition.

Section 400 discusses the type of land uses authorized in the Project Area; provides the real property in the Project Area is subject to the controls and requirements of the Snake River West Plan and construction shall comply with applicable federal, state, and local laws and ordinances and Agency development standards; and provides design guidance for development.

Section 500 outlines the general description of the proposed financing methods. Among other sources, the Snake River West Plan will utilize revenue allocation financing, authorized by

the Act. This statute was approved in 1988 by the Idaho Legislature. Section 503 and Attachment 5 to the Plan discuss revenue allocation financing and show how such financing has worked and would work in the Project Area in the future if certain new private developments occur as estimated.

Increases in assessed valuation of real and personal property in the Project Area that occur after January 1, 2025, will generate revenue for the Agency to pay project costs. Project costs include street improvements and extensions, water and sewer improvements, canal crossing improvements and other public improvement costs. The assessed valuation of real and personal property on the base assessment roll is still available for use by the other taxing districts, Bonneville County, city of Idaho Falls, Bonneville County Ambulance, College of Eastern Idaho, Idaho Falls School District No. 91, Bonneville County Road and Bridge, and Fire District #1 to finance their operations. The Snake River West Plan authorizes the Agency to sell revenue bonds to finance project costs, developer and/or public entity advance funding of project costs eligible for reimbursement and to use annual revenue allocations to pay the debt service, as well as funding projects on a pay as you go basis.

The program outlined in the Snake River West Plan emphasizes the installation of needed public improvements, street improvements, utility work, and other costs to encourage private development.

Attachment 5 to the Plan describes in detail the cost and financing methods for complete repayment of the debt incurred, of costs used to finance projects, and to also fund the additional described activities, including reimbursement of advance funded eligible public improvement costs to property owners/developers or public entities.

The Snake River West Plan follows the underlying zoning classifications of the City of Idaho Falls.

Sections 600 and 700 describe cooperative activities by the Agency with the City to carry out the Snake River West Plan.

Sections 800 – 1200 provide that the duration of the Snake River West Plan is for twenty (20) years; provides a termination process of the Snake River West Plan; provides the requirement of the Agency to prepare an annual report each year describing its activities during the previous year and to comply with certain other reporting requirements.

ATTACHMENTS TO THE SNAKE RIVER WEST PLAN

Attachment 1	Boundary Map of Snake River West Urban Renewal Project Area and Revenue Allocation Area
Attachment 2	Legal Description of Snake River West Urban Renewal Project Area and Revenue Allocation Area
Attachment 3	Private Properties Which May be Acquired by the Agency

Attachment 4 Map Depicting Expected Land Use and Current Zoning Map of the Project Area

Attachment 5 Economic Feasibility Study

Attachment 6 Agricultural Operation Consents

The full text of the Ordinance No. ____ is available at the offices of the City Clerk, 308 Constitution Way, Idaho Falls, Idaho, 83405.

This summary is approved by the Idaho Falls City Council at its meeting of March 20, 2025.

_____
Rebecca Casper, Mayor

ATTEST:

_____
Emily Geisler, City Clerk

I, Michael A. Kirkham, City Attorney for the city of Idaho Falls, Idaho, hereby declare and certify that in my capacity as City Attorney of the city of Idaho Falls, pursuant to Idaho Code Section 50-901A(3) of the Idaho Code as amended, I have reviewed a copy of the above Summary of Ordinance, have found the same to be true and complete, and said Summary of Ordinance provides adequate notice to the public of the contents, including the exhibits, of Ordinance No. ____.

DATED this _____ day of March 2025.

_____
Michael A. Kirkham, City Attorney
Idaho Falls, Idaho

4902-9051-8557, v. 1

IDAHO FALLS REDEVELOPMENT AGENCY
PO BOX 50220
IDAHO FALLS, IDAHO 83405-0220

TO: **Idaho Falls Planning and Zoning Commission**
FROM: **Wade Sanner**
SUBJECT: **Snake River West Urban Renewal Plan and Consistency with the Imagine IF Comprehensive Plan**
DATE: **March 3, 2025**

Introduction and Legal Requirement

In response to national trends and federal programs dealing with deteriorating urban areas, Idaho passed the Idaho Urban Renewal Law of 1965 to give cities and counties tools to deal with challenging areas within their jurisdictions. Idaho Code Title 50, Chapters 20 and 29 outlines law and requirements of utilizing these tools. Primarily, the laws allow for the creation of urban renewal areas, which establishes tax-increment financing as a method to reinvest tax revenues into the area in need. The revenues collected over the life of the district, which is limited to 20 years, pays for public infrastructure or other eligible improvements which help incentivize development or redevelopment. Idaho Falls created the Idaho Falls Redevelopment Agency (Agency) to create and manage these urban renewal areas. To date, the Agency has created six districts, two of which have since closed, which have generated millions of dollars in tax-increment revenue and raised land values hundreds of millions of dollars.

In winter 2024, the Agency began the process of de-annexing the properties from the Eagle Ridge Urban Renewal District, and the consideration of a new urban renewal district from the de-annexed portion for the Snake River West area. This area is bounded to the north by Pioneer Road, on the east by Pioneer Way and a property containing storage units under Bonneville County Jurisdiction, to the north and west by Interstate 15, and to the south by the Porter Canal.

Before an area can be considered for a new district, the Agency and City Council must determine the site meetings at least one of the 14 eligibility requirements outlined in the state code. An eligibility report prepared by Brad Cramer and approved by both the Agency Board and the City Council determined the area meets 11 of the 14 criteria outlined in Idaho Code 50-2018(8) and (9) and 50-2903(8). Since then, Mr. Cramer has prepared a financial feasibility study and the legal team at Elam and Burke has prepared an urban renewal plan, both of which are required to establish a new district. The Agency Board approved the plan and feasibility study as an attachment at its February 14 meeting. Both documents are included in this packet.

For the purposes of this report, the most relevant section of the plan is 300, found on page 10 of the document. It lists the general types of projects anticipated with the revenues collected. For each project, a developer must pay up front for the costs of the project and then the Agency will reimburse eligible costs through the tax revenues collected. Not all projects from the plan are listed in this report as the nature of the plan is to cover a very broad range of potential projects

due to limitations from state law on amending the plan later. However, the main projects anticipated by the applicant for this project are to blast and remove basalt on the main development site, any needed improvements to public utilities, and any needed construction or improvements of other infrastructure including streets and sidewalks.

Before the plan can proceed to the City Council for final approval, Idaho Code 50-2008(b) requires the Planning and Zoning Commission to review it and determine its conformity with the City's Comprehensive Plan.

> Prior to its approval of an urban renewal project, the local governing body shall submit such plan to the planning commission of the municipality, if any, for review and recommendations as to its conformity with the general plan for the development of the municipality.

The purpose of this staff report is to illustrate how the proposed plan is consistent with the principles found in Imagine IF: A Plan to Move Idaho Falls Forward Together.

Land Use Map

The future land use map in Imagine IF (pg. 73) shows the area under consideration as Mixed-Use Centers and Corridors.

> Snapshot: The Mixed-Use Centers and Corridors Transect denotes areas where people tend to shop, eat, and gather. These areas include all housing types but generally at a more intense scale than other areas. These areas also include mixed-use buildings, recreation centers and commercial uses. Mixed-Use Centers and corridors may vary in scale from large, regional commercial centers with supportive housing to smaller commercial pockets called walkable centers that support a well-connected, walkable neighborhood. (Imagine IF pg. 67)

The site and proposed development are consistent with this designation in at least three ways. Within one mile to the south is Curtiss-Wright Corporation office building that employs individuals in the energy sector, and two apartment complexes. The applicant is proposing new multi-story residential buildings and a hotel adjacent to the Mountain America Center. The residential units will create more housing options in this area of Idaho Falls. The Mountain America Center a regional event center and sports stadium is adjacent to the urban renewal district to the west. To the north of the urban renewal district is the I-15 corridor. A future bridge is proposed to cross the Porter Canal, adjacent to the urban renewal district to the providing additional access to the Mountain America Center, alleviating traffic congestion on Pioneer Road, and creating greater connectivity.

The second way that development of this area through urban renewal is highlighted in the eligibility report. As described in the eligibility report, future improvements of Pioneer Road will provide direct access to the properties, with additional pedestrian access. Using urban renewal tools allows the site to be developed and place more residents in the vicinity of surrounding amenities and mixed land uses.

The third way the proposal is consistent with the future land use map is the type of development proposed in the urban renewal plan. The Mixed-Use Centers and Corridors area is intended to have taller buildings and more dense development. The proposed development for the site is multi-story, higher density residential neighborhood. This style of development is consistent with the Mixed-Use Centers.

City Wide Comprehensive Plan Policies

Besides being consistent the future land use map, the use of urban renewal in this area is consistent with other policies and goals in the City-wide section of Imagine IF. These are identified below by plan theme in the table on the following pages.

Theme	Issue	Objective	Action	How the Plan Achieves the Action
Community Health	1. Connectivity and Access to Daily Services	A. Focus on Walkable Centers	Action 1. Identify existing and potential walkable centers and focus on promoting a mix of uses where people can live and easily access daily needs.	Although not a central part of an identified walkable center, this area is within 1 mile of the Mountain America Center, a major entertainment venue for the area.
			Action 2: Identify and work on barriers to easy walkable and bikeable access to daily needs.	Proposed projects in the plan include construction or improvement of the Pioneer Road right-of-way, which would include the completion of the sidewalk/trail along the southern edge of Pioneer Road.
		Focus on Becoming a 15-minute City	Action 4: Require new development to connect to adjacent residences or commercial/office areas.	This development will be hedged in by two commercial properties to the west and the east. As continued commercial redevelopment occurs in the area, the residential uses will be greater served by the surrounding properties. This development will also improve overall connectivity by building sidewalks in the area.
Housing	1. Affordability and Availability	A. Diversity Housing Stock	Action 3: In coordination with the IdaHome Committee, developers, and builders, identify and remove barriers to the construction of alternative housing types.	This development will provide more housing options for Idaho Falls. The proposed commercial uses on the western edge of the redevelopment district will complement the event center use and draw more people to the area.
		B. Expand Capacity to Address Housing	Action 4. Coordinate and partner with CDBG and other	Although this project is not being done in conjunction with CDBG, the main project is diversifying the housing stock in the city with the construction of more

		Issues	grant programs in implementing the CDBG 5-Year Plan's goals for increasing affordable housing availability.	multi-family units providing greater variety in housing options and price points.
		C. Focus on Infill	Action 2. Consider incentive programs to promote development where infrastructure already exists.	The plan area is surrounded by existing streets and utilities. The site is infill as development has already occurred around it and no new roads are required to service it.
			Action 3. For infill and redevelopment, require connection or appropriate integration with existing development such as pathways or roads.	As already noted, projects in the plan include new sidewalks along Pioneer Road.
Economic Development	2. Investing in Older and Deteriorating Areas	A. Develop Appropriate and Varied Tools for Addressing Redevelopment and Infill	Action 1. Continue to collaborate and partner with the Idaho Falls Redevelopment Agency to identify and promote redevelopment opportunities in older parts of the city. Action 2. Promote Tax-Increment Financing as a	These actions are combined because they are both accomplished directly through the proposed urban renewal plan. Tax-increment financing districts cannot be created without an urban renewal agency. As noted about, the financing will allow for the widening of Pioneer Road and the extension of water and sewer utilities along Pioneer Road making the site developable.

			primary tool for redevelopment.	
			Action 4: Encourage development in areas already served by public utilities and/or where extensions of facilities are least costly, by exploring infill incentive programs.	Water and sewer lines exist to the northeast and southwest. This development would connect these two sections of lines and loop the utilities.
Community Design	1. Appropriate Infill and Redevelopment	A. Ensure Infill Development is Compatible with Existing Uses and Character	Action 4: Find ways to better accommodate and implement redevelopment and infill by working with developers to help create projects that service the needs of the immediate area.	Urban renewal projects must serve the needs of the immediate area. The taxes collected can only be invested in the boundaries of the district and in projects that serve the public good. In this district, the funds will make the sites developable and improve the infrastructure in the area.

Area 4 Actions and Policies

Imagine IF divides Idaho Falls into 5 geographies or neighborhoods. The proposed district is in Area 4, which includes downtown, south downtown, the subject area, and development on the north end of town. Like the City-wide policies and actions, each area has its own goals and objectives specific to the area's needs. As above, relevant actions which the proposed urban renewal plan helps fulfill are listed in the table below and organized by theme. Although there were fewer specifics the plan meets for Area 4, there are still important connections and accomplishments.

Theme	Issue	Objective	Action	How the Plan Achieves the Action
Community Health	1. Connectivity and Access to Daily services	A. Improve Connectivity	Action 1: Connect areas along Pioneer Road including sidewalks, as well as pedestrian paths along the Porter Canal.	Although not a full connection, as noted above, the plan's project includes sidewalk improvements on Pioneer Road along the northern boundary of the district.
			Action 3: Invest in neighborhoods in ways such as improving walking paths, adding benches, neighborhood groups to lead events, upkeep and beautification projects.	Here again, the plan anticipates improving public infrastructure in the boundary including sidewalk improvements. As the district matures, if there are sufficient funds, they may be used for other public improvements and projects to improve the area.

Conclusion

Based on the above analysis, the Agency believes the proposed Snake River West Urban Renewal District and associated plan are consistent and with the Imagine IF Comprehensive Plan. The proposed boundary and projects conform to the objectives and actions listed both in the City-wide and Area 4 sections of the plan as outlined in the tables. The Agency respectfully recommends approval of the resolution finding the proposed urban renewal plan in conformity with the City's Comprehensive Plan.

ACCESS CONTROLLED STORAGE

1333 South Pioneer Road • Idaho Falls, Idaho 83402 • (208) 523-7867

March 14, 2025

City Council
City of Idaho Falls
680 Park Avenue
Idaho Falls, ID 83402

Re: Snake River West Urban Renewal Project

Dear City Council:

I write to object to the Snake River West Urban Renewal Project. My name is Kittie Sieh. I am the owner and operator of Access Controlled Storage which is a self storage facility located directly to the east of the proposed Project. My property is located in the County. It is not annexed into the City of Idaho Falls. The proposed project inexplicably includes a portion of Pioneer Road directly in front of my business. I also live on the property and believe that the proposed Project should not include Pioneer Road in front of my property. Or if it does, modifications should be made so as not to interfere with my operations. My objections to the Project are:

1. My property is not "deteriorating and/or deteriorated" as described in the Project proposal. It is inappropriate to include my property, or the roadway in front of my property, as a part of the Urban Renewal Project when there is no criteria that would justify an Urban Renewal Project covering my property.

2. To my knowledge, the City of Idaho Falls does not own the Pioneer Road right-of-way in front of my property. It is a County road. The Project should be limited to City owned land.

3. Access to my storage facility off Pioneer Road is controlled by a gate. I frequently have customers who pull off Pioneer Road towing a trailer and boat. It is approximately 87 feet from the entry keypad to the center of Pioneer Road. A crew cab pickup truck towing a trailer and boat could be 75 feet in length. If Pioneer Road were widened or a sidewalk were added, it would create a safety issue for vehicles pulling off Pioneer Road onto my property. Making access to my property more difficult will also affect my ability to attract and maintain customers. Ease of access is crucial to the success of my business.

AccessControlledStorage@gmail.com • www.accesscontrolledstorage.com

Also, the Project Proposal itself states that any development within the Urban Renewal Project needs to "serve not only the Project Area and any new or existing developments, but to also serve areas outside the Project Area by providing convenient and efficient vehicular access and movement." 402 Public Right-of-way, P. 26. The current Project Proposal does not serve my property and almost certainly will adversely affect access and movement of my customers.

4. Lastly, I have made multiple improvements to my property along Pioneer Road. Such improvements include signs, street lights, fences, trees, shrubs, irrigation systems, and raised garden beds. These enhance the beauty and attractiveness of the property. Widening Pioneer Road will adversely affect the property and its aesthetics.

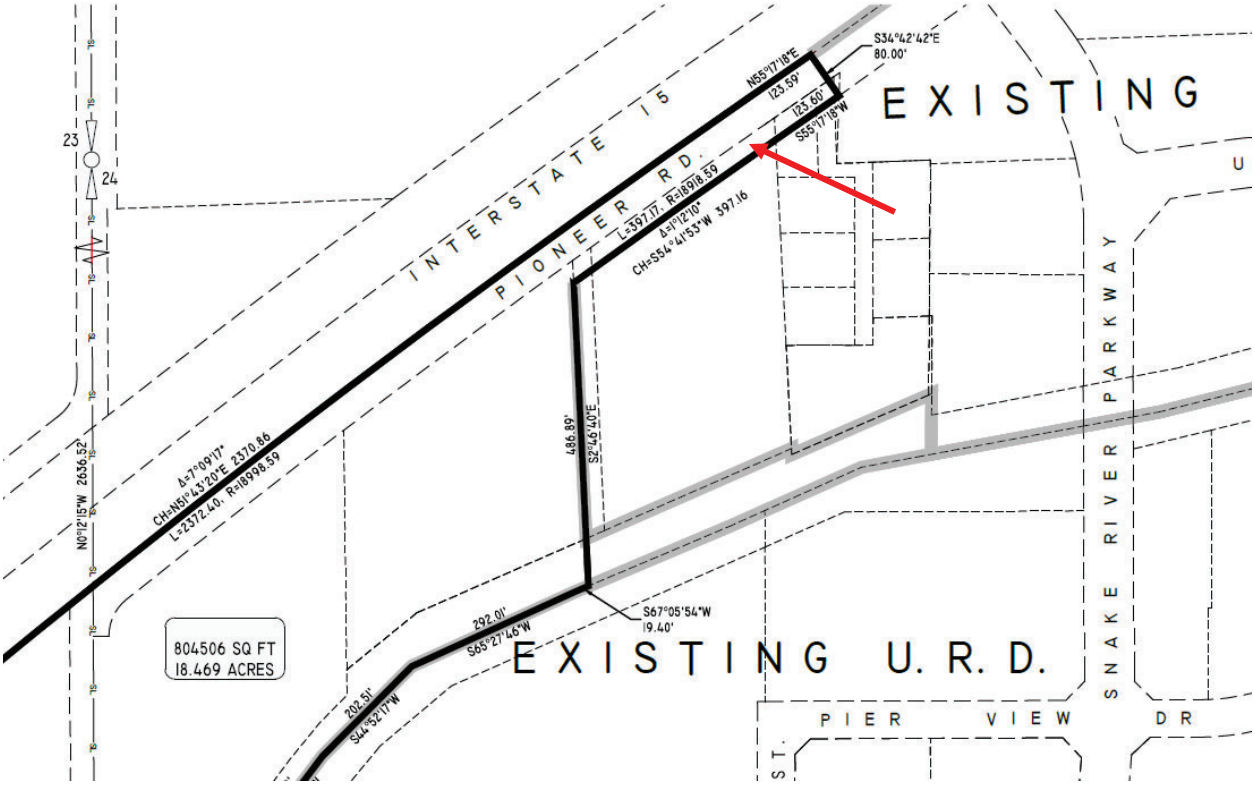
For the reasons outlined above, I object to the proposed Urban Renewal Project. I would ask that the current petition be denied, or in the alternative that the portion of Pioneer Road in front of my property be excluded from the Project.

Sincerely,

Kittie Sieh

Kittie Sieh, Owner

INTERSTATE 15
PIONEER RD.
EXISTING U
E RIVER PARKWAY
S34°42'42"E
80.00'
N55°17'18"E
123.59'
123.60'
S55°17'18"W
L=397.17, R=1898.59
Δ=9°12'10"
CH=S54°41'53"W 397.16
486.89'
S2°46'40"E
Δ=7°09'17"
CH=N51°43'20"E 2370.86
L=2372.40, R=18998.59
N0°12'15"W 2636.52'
23
24


INTERSTATE 15
PIONEER RD.
EXISTING
EXISTING U.R.D.
SNAKE RIVER PARKWAY
PIER VIEW DR
ST.
S34°42'42"E
80.00'
N55°17'18"E
123.59'
123.60'
S55°17'18"W
L=397.17, R=1898.59
Δ=9°12'10"
CH=S54°41'53"W 397.16
486.89'
S2°46'40"E
Δ=7°09'17"
CH=N51°43'20"E 2370.86
L=2372.40, R=18998.59
N0°12'15"W 2636.52'
23
24
804506 SQ FT
18.469 ACRES
292.01'
S65°27'46"W
S67°05'54"W
19.40'
202.51'
S44°52'17"W

Memorandum

File #: 25-197 **City Council Meeting**

FROM: Wade Sanner, Director
DATE: Friday, March 21, 2025
DEPARTMENT: Community Development Services

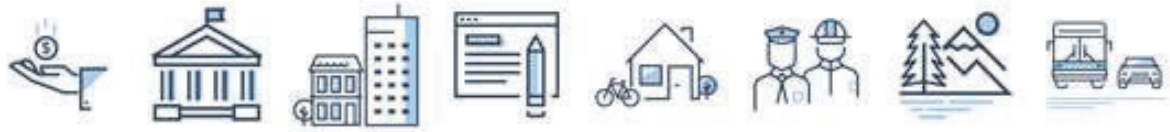
Subject
Quasi-judicial Public Hearing-Rezone from LC, Limited Commercial to I&M, Industrial and Manufacturing, Zoning Ordinance and Reasoned Statement of Relevant Criteria and Standards for approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East.

Council Action Desired
☒ Ordinance ☐ Resolution ☒ Public Hearing
☒ Other Action (Approval, Authorization, Ratification, etc.)
1. Approve the Ordinance Rezoning approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East from LC, Limited Commercial to I&M, Industrial and Manufacturing, under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

2. Approve the Reasoned Statement of Relevant Criteria and Standards for the Rezone from LC to I&M and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
Attached is the application for Rezoning approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East from LC, Limited Commercial to I&M, Industrial and Manufacturing, Zoning Ordinance, and Reasoned Statement of Relevant Criteria and Standards for approximately 9.948 acres in the NE ¼ of the SE ¼ of Section 7, Township 2 North, Range 38 East. The Planning and Zoning Commission considered this item at its March 4, 2025, meeting and unanimously voted to recommend approval of the zone change from LC to I&M to the Mayor and City Council as presented.

Alignment with City & Department Planning Objectives



☐ ☒ ☒ ☐ ☒ ☐ ☒ ☐

The rationale for rezoning must be consistent with the principles of the Comprehensive Plan, which includes policies and

goals related to Good Governance, Growth, Sustainability, and Livable Communities.

Interdepartmental Coordination
N/A

Fiscal Impact
N/A

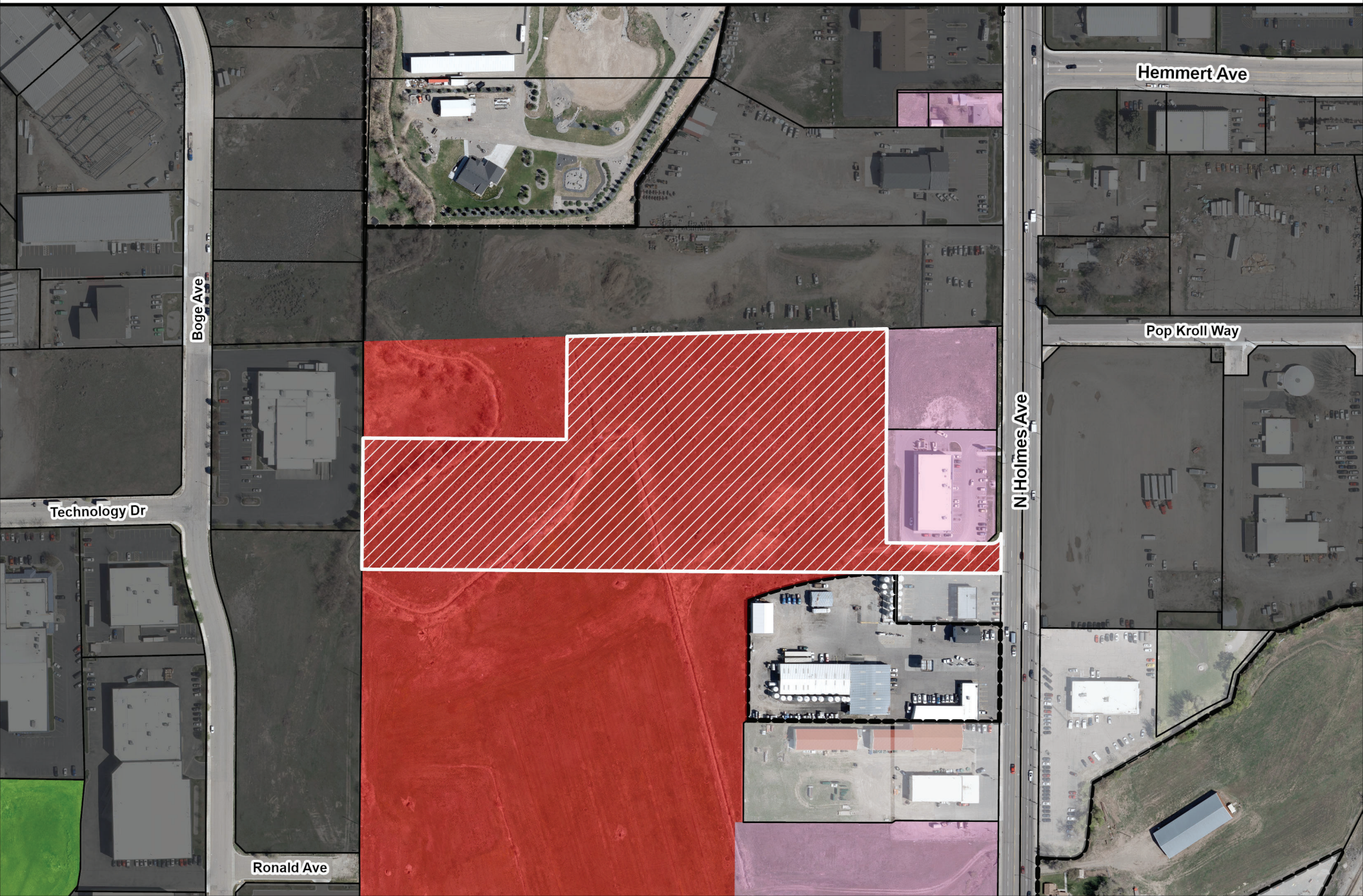
Legal Review
The application and ordinance have been reviewed by the Legal Department pursuant to applicable law.

Zoning

RZN25-001 9.95 A LC to I&M

RE | R1 | TN | R3 | PB | LC | R&D | I&M
RP | R2 | RMH | R3A | CC | HC | LM | P

N



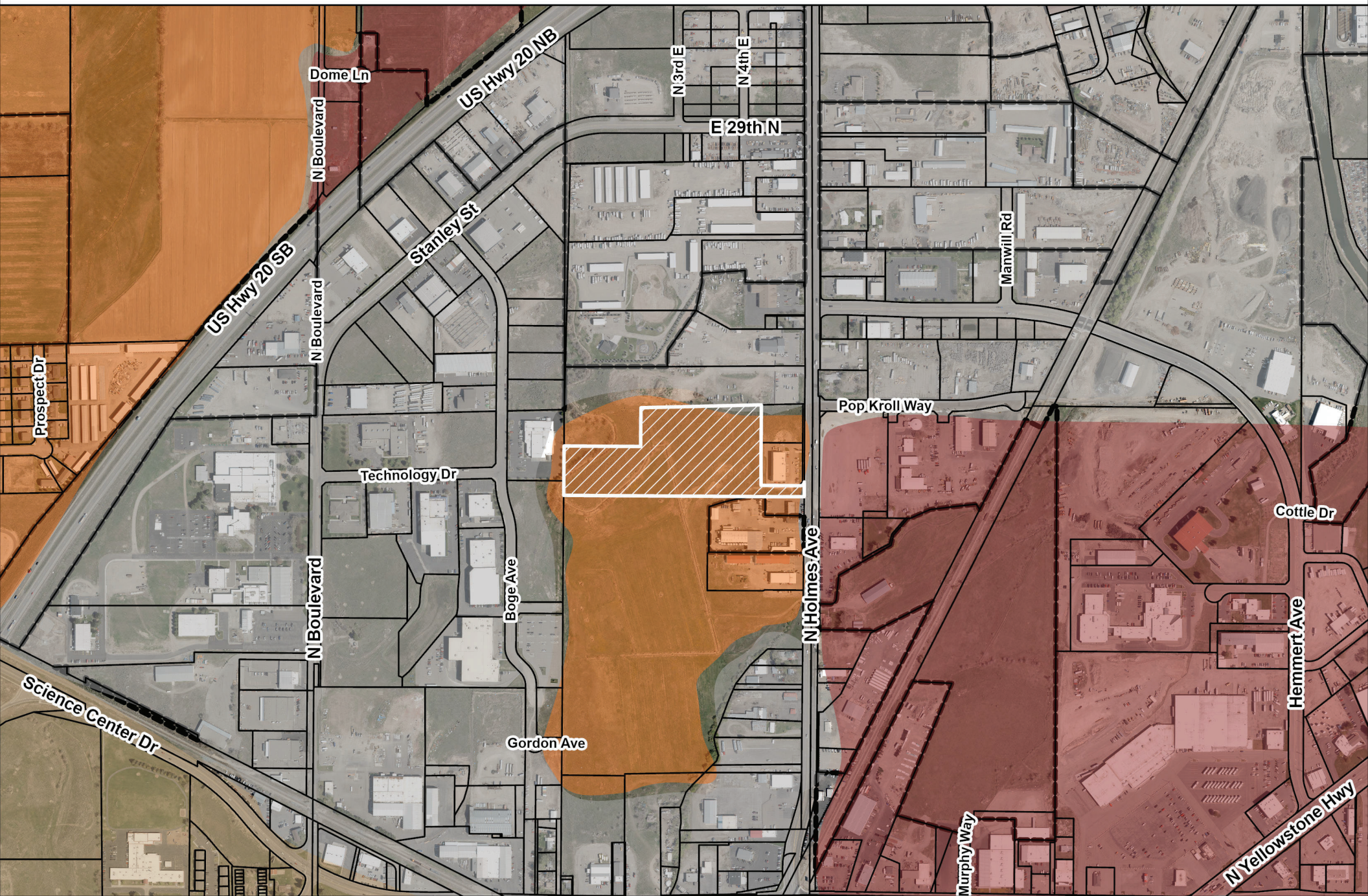
Aerial

RZN25-001 9.95 A LC to I&M

Comprehensive Plan

RZN25-001 9.95 A LC to I&M

General Urban
Industrial
Mixed Use Centers and Corridors
Natural and Open Space
Special Use
Suburban
Urban Core



STAFF REPORT

REZONE FROM LC to I&M
9.948 Acres IN THE NE1/4 SE1/4, SEC 7, T 2N, R 38
April 10, 2025

IDAHO FALLS

Community Development Services

Applicant:
Eagle Rock Engineering

Owner:
Idaho Traffic Safety Inc

Project Manager:
Brian J. Stevens

Location: Generally located north of E Anderson Street, east of Boge Avenue, south of Stanley Street, and west of N Holmes Avenue.

Size: Approx 9.948 acres

Existing Zoning:
Site: LC
North: I&M, LC
South: LC, LM, County
East: HC
West: I&M, LC

Existing Land Uses:
Site: Vacant
North: Vacant Industrial
South: Vacant, Light manufacturing & County Commercial
East: Commercial
West: Industrial

Future Land Use Map:
General Urban and Industrial

Attachments:
1. Zoning Ordinance Information
2. Comprehensive Plan Policies
3. Maps and aerial photos

Requested Action: For the Mayor and City Council to Approve the rezone from LC, Limited Commercial to I&M, Industrial and Manufacturing.

History: From our historic aerials dating back to 1954 this land appears to have been Ag land with minor industrial and commercial infill on the fringes over time.

Staff Comments:

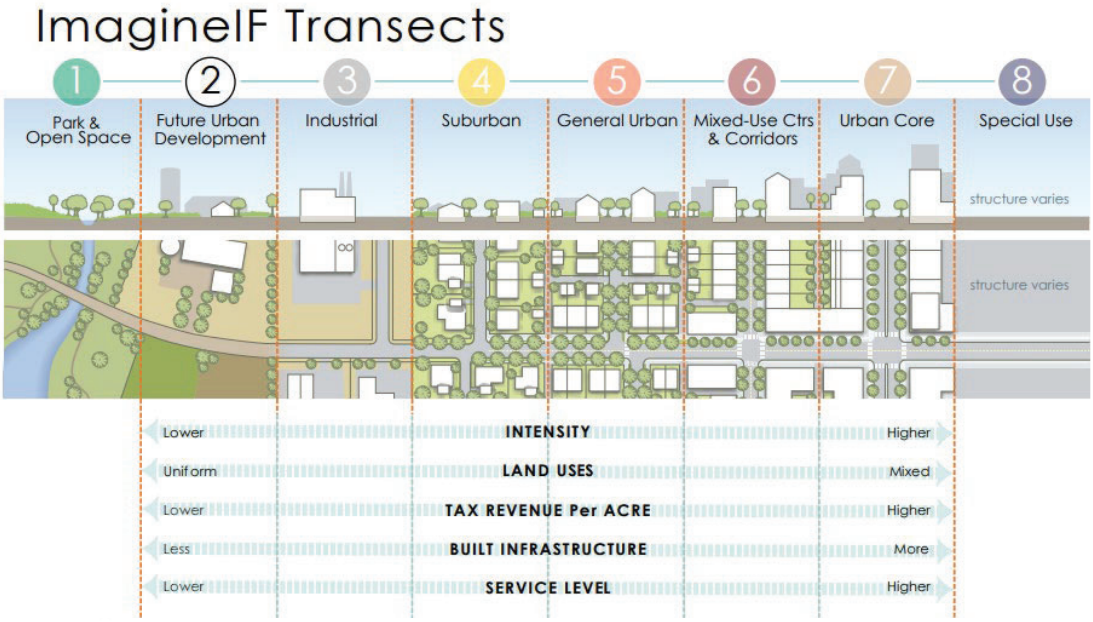
The Future land use map shows this area as General Urban and I&M. The I&M Zone is consistent with the Higher intensity designation.

The surrounding zoning is mixed in the area and I&M is compatible with the zones surrounding the parcels. The Requested I&M Zone is consistent with a large part of the surrounding zoning.

North Holmes Ave is designated as a Principal Arterial.

Staff Recommendation: recommend to the Mayor and City Council approval of the rezone from LC to I&M.

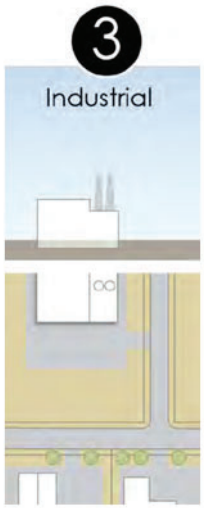
Comprehensive Plan



5. **General Urban**

Snapshot: The General Urban Transect denotes residential areas with a mix of commercial and service uses convenient to residents. These areas contain a wide variety of housing types, generally including small single-units, duplexes, triplexes, fourplexes, courtyard apartments, bungalow courts, townhouses, multiplexes and live-work units. Lot sizes are smaller and more compact than suburban areas. These areas could also include, parks, schools, churches and commercial services. These areas have highly connective street patterns, similar to the traditional grid-pattern that encourages bicycle and pedestrian usage. These areas should be near an existing or part of a new walkable center.

Local examples: Bonnavista Addition, Johns Height Subdivision, Jennie Lee Addition, Bell-Aire, Linden Park, Linden Trails, Falls Valley



3. **Industrial**

Snapshot: The Industrial Transect denotes areas set aside for all varieties of industrial operations, from manufacturing facilities and related warehousing and distribution to machine shops or greenhouses. These areas are generally near major roadways, with frontage on arterial roadways, and they may have railroad access.

Local examples: Industrial Parks south of Sunnyside Road along the Yellowstone Highway Corridor, Anheuser Bush facilities, industrial park located north of Science Center Drive/Anderson Street and US 20

Considerations: Because the comprehensive plan provides only general guidance for zoning decisions, the Planning Commission shall also take the following considerations into account:

	Applicant Response
Explain how the proposed change is in accordance with the City's Comprehensive Plan.	In the city of Idaho falls comprehensive plan (imagine if) it shows in the future land use map that our project location falls within the industrial land use zone. Where it is currently zoned for lc we are trying to rezone to i-m that would match the zone of the adjacent property to our north.
What Changes have occurred in the area to justify the request for a rezone?	It is zoned as lc. This zone is described to be smaller scale commercial for retail and close to residential. The client is wanting to use this area for storage of their traffic control equipment, signs, sign standards, candles, drums, crash barrels, etc.
Are there existing land uses in the area similar to the proposed use?	Yes there is property to our north and west that are zoned i-m.
Is the site large enough to accommodate required access, Parking, landscaping, etc. for the proposed use?	Yes we meet all city code for the proposed use
Will a Neighborhood meeting be held prior to the Planning Commission Meeting: if Yes, Where and When:	Yes; Date and Time: November 12, 2024 at 6:00 p.m. Location: City library room #2, Idaho Falls, ID.
Criteria for Rezoning Section 11-6-5(I) of Ordinance	**Staff Comment**
The Zoning is consistent with the principles of City's adopted Comprehensive Plan, as required by Idaho Code.	Yes, the I&M zone is consistent with the designation.
The potential for traffic congestion as a result of development or changing land use in the area and need that may be created for wider streets, additional turning lanes and signals, and other transportation improvements.	Rezoning to I&M will have minimal impacts.
The potential for exceeding the capacity of existing public services, including, but not limited to: schools, public safety services, emergency medical services, solid waste collection and disposal, water and sewer services, other public utilities, and parks and recreational services.	Rezoning to I&M will have minimal Impacts and will not exceed existing capacity.
The potential for nuisances or health and safety hazards that could have an adverse effect on adjoining properties.	Staff is unaware of specific nuisances or hazards.
Recent changes in land use on adjoining parcels or in the neighborhood of the proposed zoning map amendment.	no

Transportation Plan:
North Holmes Ave is a Principal Arterial.

Zoning Ordinance:

Existing

LC Limited Commercial Zone. This zone provides a commercial zone for retail and service uses which supply the daily household needs of the City's residents. This Zone is usually located on major streets contiguous to residential uses. This zone is characterized by smaller scale commercial uses which are easily accessible by pedestrians and non-motorized vehicles from the surrounding residential neighborhoods, although larger scale developments such as big-box stores may still serve as anchors. Connectivity is provided with walkways that provide access to and through the development site. Parking for vehicles is understated by the use of landscaping, location, and provision of pedestrian walkways to the businesses.

Proposed

I&M Industrial and Manufacturing Zone. This zone provides an industrial zone in which the primary use of the land is a manufacturing, fabricating, processing, and warehousing. Land zoned I&M should be relatively flat, open land, conveniently located close to transportation, public utilities and other facilities necessary for large employment centers and successful manufacturing operations

Table 11-3-6: Dimensional Standards for Industrial Zones

	LM	I&M
Site Area- Minimum in acres		
Setbacks – Minimum in ft.		
Front	30	30
Side	0/30*	0/30*
Rear	0/30*	0/30*
Building Height- Maximum	see sub-sections (2) below	
Lot Coverage- Maximum in %	80	
Building Coverage- Maximum in %	50	
*See explanations, exceptions and qualifications that follow in 11-3-8A (1-2) of this Zoning Code.		

11-2-5: ALLOWED USES IN INDUSTRIAL AND SPECIAL PURPOSE ZONES.

Table 11-2-3: Allowed Uses in Industrial Zones

P = permitted use. C1 = administrative conditional use. C2 = Board of Adjustment conditional use. C3 = City Council conditional use. A blank denotes a use that is not allowed in that zone.

*Indicates uses that are subject to specific land use provisions set forth in the Standards for Allowed Land Uses Section of this Chapter.

	Industrial		Special Purpose	
Proposed Land Use Classification	**LM**	**I&M**	**R&D**	**P**
Accessory Use	P	P	P	
Accessory Use, Fuel Station*	P	P	P	
Accessory Use, Storage Yard*	P	P	P	
Airport	P			
Agriculture*	C_2	P		C_2
Agriculture Tourism	C_2	P		C_2
Amusement Center	P	P		
Amusement Center, Indoor Shooting Range*	P	P		
Amusement Center, Outdoor*	P	P		C_2
Adult Business*		P		
Animal Care Clinic*	P	P		
Animal Care Facility*	P	P		
Artist Studio	P	P		
Auction, Livestock		C_2		
Building Contractor Shop	P	P		
Building Material, Garden and Equipment	P	P		
Cemetery*				C_2
Club*	P	P		
Communication Facility	P	P	P	
Correctional Facility or Jail	C_2	P		
Day Care Center*	P	P	P	
Drinking Establishment	P	P		
Drive-through Establishment*	P	P		
Dwelling, Accessory Unit*	P	P		
Eating Establishment	P	P		
Dry Cleaning	P	P		
Dwelling, Multi-Unit*			P	
Eating Establishment, Limited	P	P	P	
Equipment Sales, Rental and Service	P	P		
Financial Institution	P	P	P	
Food Processing, Small Scale Processing With or Without Sales	P	P		
Food Products, Processing, With or Without Retail Sales		P		

Proposed Land Use Classification	LM	I&M	R&D	P
Food Store	P	P		
Fuel Station, Super	P	P		
Health Care and Social Services			P	
Higher Education Facilities	P		P	
Hospital*	C_2	C_2	C_2	
Industry, Craftsman	P	P		
Industry, Heavy		P		
Industry, Light	P	P		
Information Technology	P	P	P	
Lodging Facility	P		C_2	
Medical Support Facilities	P		P	
Parking Facility	P	P	P	
Park and Recreation Facility*				P
Pawn Shop	P	P		
Personnel Service	P	P		
Professional Service	P	P	P	
Public Service Facility*	P	P	C_2	C_2
Public Service Facility, Limited	P	P	P	P
Public Service Use	P	P	P	P
Railroad Freight Terminal and Station		P		
Recreational Vehicle Park*				C_2
Research and Development Business	P	P	P	
Retail	P	P		
Storage Facility, Indoor	P	P		
Storage Facility, Outdoor	P	P		
Storage Yard*	P	P		
Terminal Yard, Trucking and Bus		P		
Transit Station	P	P	P	
Vehicle Body Shop	P	P		
Vehicle Sales, Rentals and Service	P	P		
Vehicle Washing Facility	P	P		
Warehouse	P	P		
Warehouse, Wholesale With Flammable Materials	P	P		

(Ord. 3218, 9-13-18) (Ord. 3233, 12-20-18) (Ord. 3451, 3-31-22) (Ord. 3496. 12-8-22) (Ord. 3574, 6-13-24)

March 4, 2025 7:00 p.m. Planning Department

City Annex Council Chambers

MEMBERS PRESENT: Commissioners Arnold Cantu, Bill Scott, Forrest Ihler, Matthew Meehan.

MEMBERS ABSENT: Marsha McDaniel, Dale Storer, Glen Ogden.

ALSO PRESENT: Assistant Planning Director Kerry Beutler, Naysha Foster Planner, Caitlin Long Planner, Brian Stevens Planner; Jacob Beck, Esq, City Attorney, and interested citizens.

CALL TO ORDER: Ihler called the meeting to order at 7:00 p.m.

MINUTES: Scott moved to accept the minutes of February 4, 2025, Meehan seconded the motion. The motion passed unanimously.

Public Hearings:

3. RZN 25-001: REZONE FROM LC TO I&M.

Ihler opened the public hearing.

Applicant: Kaden Fuhriman, Eagle Rock Engineering, 1330 Fremont Ave., Idaho Falls, Idaho.
Fuhriman stated that this is straight forward, and they are trying to rezone from LC light commercial to I&M. Fuhriman stated that there is I&M to the north and west and the east across Holmes. According to the Comprehensive Plan Amendment it does indicate that future land use would be general urban and industrial, and I&M would fit within the Comprehensive Plan.

Ihler asked if the applicant owns the northwest corner. Fuhriman stated that it is a different landowner.

Stevens presented the staff report, a part of the record.

Support/Opposition: No one appeared.

Ihler closed the public hearing.

Ihler is concerned that the small piece is left over LC and would that be considered spot zone. Beutler stated that because it is existing it is a remnant and not a concern for the City.

Cantu moved to recommend to the Mayor and City Council approval of the Rezone from LC to I&M Scott seconded the motion. Ihler called for roll call vote: Scott, yes; Cantu, yes; Ihler, yes; Meehan, yes. The motion passed unanimously.

ORDINANCE NO._____

AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; PROVIDING FOR THE REZONING OF APPROXIMATELY 9.948 ACRES AS DESCRIBED IN SECTION 1 OF THIS ORDINANCE FROM LC, LIMITED COMMERCIAL TO I&M, INDUSTRIAL AND MANUFACTURING; AND PROVIDING SEVERABILITY, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE.

WHEREAS, the proposed zoning district of lands described in Section 1 is I&M Zone for such annexed lands and such zoning is consistent with the current City of Idaho Falls Comprehensive Plan Land use designation of General Urban and Industrial; and

WHEREAS, the proposed zoning district is consistent and compatible with the existing and surrounding zoning districts and is consistent with the City of Idaho Falls Comprehensive Plan; and

WHEREAS, Idaho Falls Planning and Zoning Commission held a duly noticed public hearing on March 4, 2025, and recommended approval of zoning the subject property to I&M Zone; and

WHEREAS, the Idaho Falls City Council conducted a duly noticed public hearing and passed a motion to approve this zoning on April 10, 2025.

NOW THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, AS FOLLOWS:

SECTION 1: LEGAL DESCRIPTION:

This ordinance shall apply to the following described lands in Idaho Falls, Idaho, Bonneville County, to-wit:

Approximately 9.948 acres, a parcel of land lying in the NE1/4 SE1/4, SEC 7, T 2N, R 38**.**

SECTION 2. Zoning. That the property described in Section 1 of this Ordinance be and the same hereby is zoned "I&M Zone" and the City Planner is hereby ordered to make the necessary amendments to the official maps of the City of Idaho Falls which are on file at the City Planning Department Offices, 680 Park Avenue.

SECTION 3. Savings and Severability Clause. The provisions and parts of this Ordinance are intended to be severable. If any section, sentence, clause or phrase of this Ordinance should be held to be invalid or unconstitutional by a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause or phrase of this Ordinance.

SECTION 4. Publication. This Ordinance, or a summary thereof in compliance with Idaho

Code, shall be published once in the official newspaper of the City, and shall take effect immediately upon its passage, approval, and publication.

SECTION 5. Effective Date. This Ordinance shall be in full force and effect from and after its passage, approval and publication.

PASSED by the City Council and APPROVED by the Mayor of the City of Idaho Falls, Idaho, this_____day of_____, 2025.

CITY OF IDAHO FALLS, IDAHO

_____
Rebecca L. Noah Casper, Mayor

ATTEST:

_____
Emily Geisler, City Clerk

(SEAL)

STATE OF IDAHO)
) ss:
County of Bonneville)

I, EMILY GEISLER, CITY CLERK OF THE CITY OF IDAHO FALLS, IDAHO, DO HEREBY CERTIFY:

> That the above and foregoing is a full, true and correct copy of the Ordinance entitled, "AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; PROVIDING FOR THE REZONING OF APPROXIMATELY 9.948 ACRES AS DESCRIBED IN SECTION 1 OF THIS ORDINANCE FROM LC, LIMITED COMMERCIAL TO I&M INDUSTRIAL AND MANUFACTURING; AND PROVIDING SEVERABILITY, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE."

_____
Emily Geisler, City Clerk

REASONED STATEMENT OF RELEVANT CRITERIA AND STANDARDS

REZONE FROM LC, LIMITED COMMERCIAL TO I&M FOR APPROXIMATELY 9.948 ACRES IN THE NE1/4 SE1/4, SEC 7, T 2N, R 38

WHEREAS, the applicant filed an application for Rezone on January 7, 2025; and

WHEREAS, this matter came before the Idaho Falls Planning and Zoning Commission during a duly noticed public hearing on March 4, 2025; and

WHEREAS, this matter came before the Idaho Falls City council during a duly noticed public hearing on April 10, 2025; and

WHEREAS, having reviewed the application, including all exhibits entered and having considered the issues presented:

I. RELEVANT CRITERIA AND STANDARDS

1. The City Council considered the request pursuant to City of Idaho Falls 2022 Comprehensive Plan, the City of Idaho Falls Zoning Ordinance, the Local Land Use Planning Act, and other applicable development regulations.
2. The property is approximately 9.948 acres located generally located north of E Anderson Street, east of Boge Avenue, south of Stanley Street, and west of N Holmes Avenue.
3. Surrounding properties are County zoning or zoned City I&M, LC, LM, and HC.
4. The Comprehensive Plan designates this area as General Urban and Industrial.
5. The proposed rezone complies with the purposes set forth within the Zoning Ordinance of the City of Idaho Falls.
6. The Idaho Falls Planning and Zoning Commission recommended approval of the zone change as presented.
7. The rezone to I&M is consistent with the surrounding zoning and the Comprehensive Plan.

II. DECISION

Based on the above Reasoned Statement of Relevant Criteria, the City Council of the City of Idaho Falls approved the Rezone as presented.

PASSED BY CITY COUNCIL OF THE CITY OF IDAHO FALLS

THIS _____ DAY OF _____, 2025

_____

Rebecca Casper - Mayor

Summary of Neighborhood Meeting Idaho Traffic Safety

Idaho Traffic Safety representative: Raymond Lindstrom Project Manager

Date: November 12, 2024

Time: 6:00 to 7:30 pm

Place: Idaho Falls City Library Room #2

Notices of meeting sent October 24, 2024

Notices sent to: See attached of list neighbors provided by the City of Idaho Falls

Property Owners that attended the meeting:

Rocky Frasure
2759 N Holmes
Idaho Falls, ID 83401

Penny Frasure
2759 N Holmes
Idaho Falls, ID 83401

Brian Wilson
MLV Boge ID LLC
2184 Channing Way #463
Idaho Falls, ID 83404

Material given to attendees: (see attached)

Quick Fact Sheet Idaho Traffic Safety
Comments about Idaho Traffic Safety Project (provided for comments)
Engineer Plat Plan of property
Google Map of property highlighting location of Shop and Office

Summary of Comments

Attendees were very positive about the project, that we are taking a very rough, rocky property and improving it. They felt that this improvement will fit well within the other businesses In the area with the new office on North Holmes and the property behind NAPA store.

There was concern about the ditch that runs on the edge of the property, which we explained would not be hindered or removed and the flow would continue to the landowner downstream.

They had questions about the lava rock we blasted which we told them the rock would either be used to level some of the ground as fill or would be hauled off.

Note: Only one letter was returned. The letter was to the State of Idaho

2700 BOGE AVE LLC
15303 VENTURA BLVD BLDG C STE 880
SHERMAN OAKS, CA 91403-3110

B A WACKERLI CO
PO BOX 50857
IDAHO FALLS, ID 83405

CONRAD & BISCHOFF LLC
2251 N HOLMES AVE
IDAHO FALLS, ID 83401

FRASURE ROCKY
2759 N HOLMES AVE
IDAHO FALLS, ID 83401

MLV BOGE ID LLC
2184 CHANNING WAY # 463
IDAHO FALLS, ID 83404

S & A PROPERTIES LLC
51 S LAVASIDE RD
BLACKFOOT, ID 83221

SIERRA PROPERTIES LLC
1363 N HOLMES AVE
IDAHO FALLS, ID 83401

STATE OF IDAHO
PO BOX 879
BOISE, ID 83707

T AND T HOLDINGS LLC
2587 N HOLMES AVE
IDAHO FALLS, ID 83401

TECH PARK I LLC
PO BOX 2044
IDAHO FALLS, ID 83403-2044

THRESHOLD LAND HOLDINGS LLC
2091 MIKAYLA LN
IDAHO FALLS, ID 83404

WAGNER LAND COMPANY
374 LINCOLN CTR
STOCKTON, CA 95207

WILLOW CREEK PARK LLC
2184 CHANNING WAY #227
IDAHO FALLS, ID 83404

October 28, 2024

2700 Boge Ave LLC
15303 Ventura BLVD Bldg C Ste 880
Sherman Oaks, CA 91403-3110

This letter is being sent to you to let you know about a development proposal, Idaho Traffic Safety LLC, in your area and to invite you to an informational meeting where we will present our development concept. You can learn more about the proposed project and can ask questions about it.

Idaho Traffic Safety is a traffic control company that has served Eastern Idaho and Western Wyoming for over 50 years. We are developing a property on North Holmes adjacent to and behind Napa Auto Parts. We have outgrown our current location on East Sunnyside in Ammon. We welcome and encourage your participation. Your input is an important part of the City's development review process. Please join us for a neighborhood meeting to discuss the proposal on November 12, 2024. The meeting will be held at the **Idaho Falls Public Library room #2 from 6:00 pm to 9:00 pm at 457 West Broadway, Idaho Falls**. The meeting is an opportunity for you to provide input on the project and to have your questions answered directly by the applicant.

If you are unable to attend the meeting, but would like to provide input or ask questions, please contact Raymond Lindstrom at 208-522-4470 or ray@idahotrafficsafety.com. We look forward to seeing you at the meeting.

Sincerely,

Raymond Lindstrom
Idaho Traffic Safety

Idaho Falls Public Library
457 West Broadway
Idaho Falls, Idaho 83402
Room #2

Welcome!

Please Sign In[1]

Date NOVEMBER 12, 2024

Name	Email Address	Phone Number
Rocky Frasure	208	589-0975
Penny Frasure	frasure@yahoo.com	
BRIAN WINSON	BRIAN@TOICOMMUNITY	208/656-2271

[1] Providing contact information is not required, and the purpose is to provide updates regarding the project. However, please be aware that any information provided on this sheet will become part of the public record.

Quick Fact Sheet Idaho Traffic Safety

Idaho Traffic Safety is a LLC company based in Ammon which contracts traffic safety for construction companies. ITS also has a division that does road painting for counties, cities and personal use totaling 21 million feet this year. Another division has four mechanical road sweepers which sweep roads before and after road construction projects. The company employs between 50-75 employees during peak construction periods.

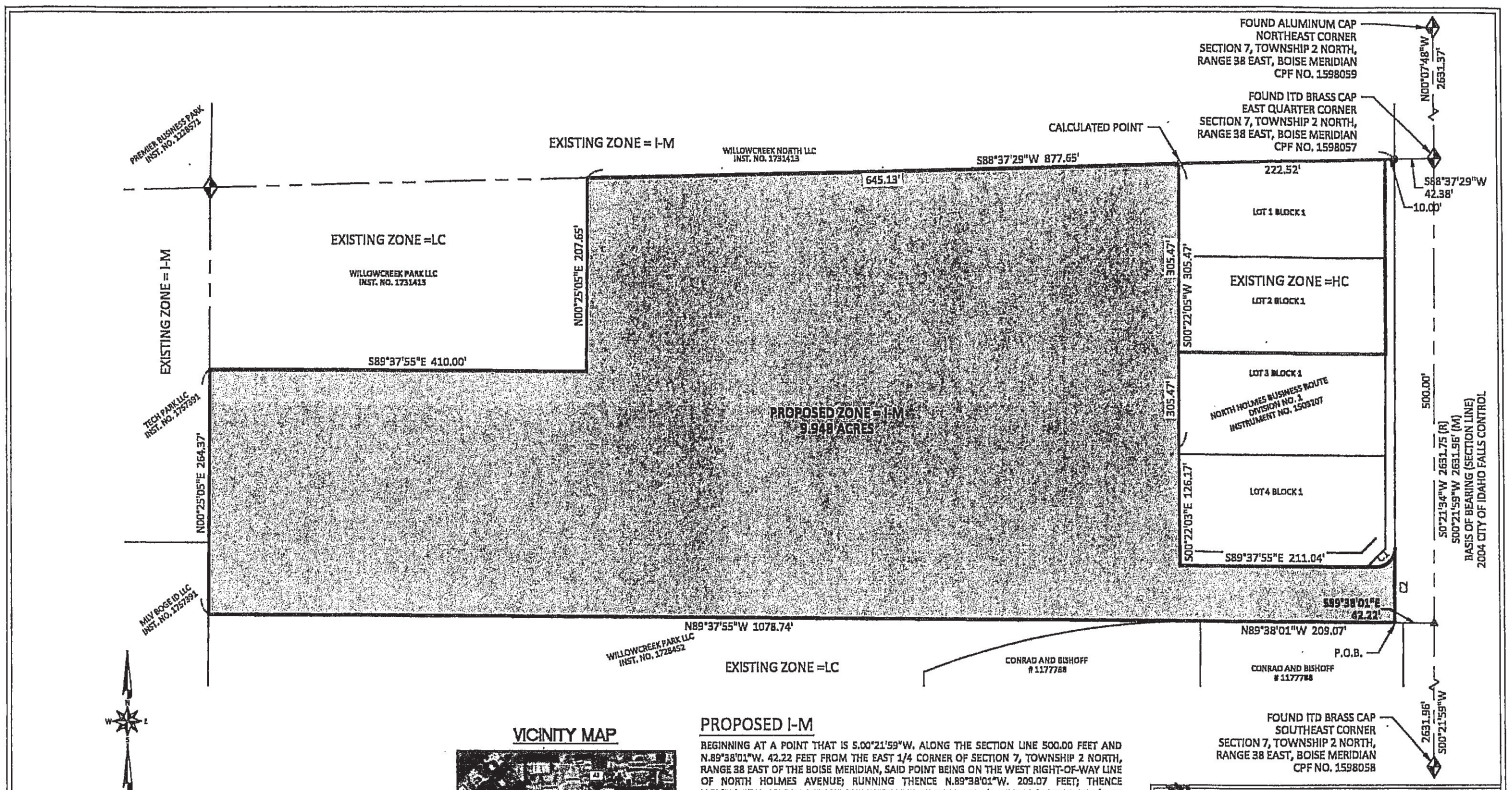
The company is a DBE company whose President is Jennifer Lindstrom, with Rob Lindstrom CEO.

ITS has out grown its current location on East Sunnyside, Ammon of 3 acres and was looking for a location of at least 10 acres. The site on North Holmes is a perfect location as it is close to Highway 20, Highway 26, Interstate I-15, and city of Idaho Falls.

Our plan is to build an office building on North Holmes next to NAPA auto parts, plus a shop 400 feet behind the office. The rest of the property will be used for storage of our traffic control equipment, signs, sign stands, candles, drums, crash barrels, etc. Our trailers, pickups, sweepers, and other equipment will also be in our yard. We will fence the property with automatic lighting and cameras.

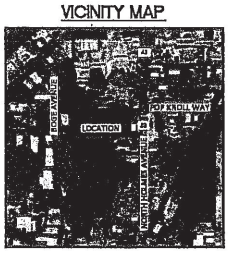
We will have two entrances, on either side of NAPA. The first will be the current entrance to the south of NAPA which is will be for trucks, trailers and larger equipment and an entrance to the north for office traffic and access to North Holmes. This will alleviate traffic slow down on North Holmes for entering and exiting traffic to our property.

Comments About Idaho Traffic Safety Project



CURVE TABLE					
CURVE	LENGTH	RADIUS	DELTA	CHORD BEARING	CHORD LENGTH
C1	31.50'	20.00'	90°15'07"	N45°29'36"E	28.35'
C2	80.01'	118381.36'	0°02'19"	S00°29'56"W	80.01'

VICINITY MAP



PROPOSED I-M

BEGINNING AT A POINT THAT IS S.00°21'59"W. ALONG THE SECTION LINE 500.00 FEET AND N.89°38'01"W. 42.22 FEET FROM THE EAST 1/4 CORNER OF SECTION 7, TOWNSHIP 2 NORTH, RANGE 38 EAST OF THE BOISE MERIDIAN, SAID POINT BEING ON THE WEST RIGHT-OF-WAY LINE OF NORTH HOLMES AVENUE; RUNNING THENCE N.89°38'01"W. 209.07 FEET; THENCE N.89°37'55"W. 1078.74 FEET TO THE WEST LINE OF THE EAST 1/2 OF THE SOUTHEAST 1/4 OF SAID SECTION 7; THENCE N.00°25'05"E. ALONG SAID WEST LINE 264.37 FEET; THENCE S.89°37'55"E. 410.00 FEET; THENCE N.00°25'05"E. 207.65 FEET TO THE EAST-WEST CENTER SECTION LINE OF SAID SECTION 7; THENCE N.88°57'29"E. ALONG EAST-WEST CENTER SECTION LINE 645.13 FEET TO THE WEST BOUNDARY LINE OF NORTH HOLMES BUSINESS ROUTE, DIVISION NUMBER 1, AN ADDITION TO THE CITY OF IDAHO FALLS, BONNEVILLE COUNTY, IDAHO; THENCE ALONG THE BOUNDARY LINE OF SAID NORTH HOLMES BUSINESS ROUTE, DIVISION NUMBER 1 THE FOLLOWING FOUR (4) COURSES: (1) THENCE S.00°22'05"W. 305.47 FEET; (2) THENCE S.00°22'03"E. 126.17 FEET; (3) THENCE S.89°37'55"E. 211.04 FEET TO A POINT OF CURVE WITH A RADIUS OF 20.00 FEET AND A CHORD BEARING N.45°29'36"E. 28.35 FEET; (4) THENCE TO THE LEFT ALONG SAID CURVE 31.50 FEET THROUGH A CENTRAL OF 90°15'07" TO SAID WEST RIGHT-OF-WAY LINE OF SAID NORTH HOLMES AVENUE, SAID POINT BEING ON A NON-TANGENT CURVE WITH A RADIUS OF 118381.36 FEET AND A CHORD BEARING S.00°29'56"W. 80.01 FEET; THENCE TO THE RIGHT ALONG SAID NON-TANGENT CURVE 80.01 FEET THROUGH A CENTRAL ANGLE OF 00°02'19" TO THE POINT OF BEGINNING;
CONTAINING 9.948 ACRES

EAGLE ROCK ENGINEERING
CIVIL ○ PLANNING ○ SURVEYING
IDAHO FALLS (208) 522-2688 BLACKFOOT (208) 339-0668

OFFICES AT:	DRAWN BY:	M. PATZER
1331 Fremont Ave. Idaho Falls, Idaho 83402	APPROVED BY:	K. ROLAND
	PROJECT NO.	24071
	SCALE:	1"=100'
310 N 2nd East, Suite 153 Rexburg, Idaho 83440	DATE:	September, 2024
	CAD NAME:	24071 REZONE MAP.dwg

Memorandum

File #: 25-198 **City Council Meeting**

FROM: Wade Sanner, Director
DATE: Friday, March 21, 2025
DEPARTMENT: Community Development Services

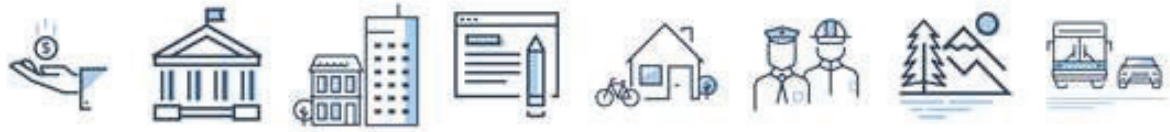
Subject
Quasi-judicial Public Hearing-Rezone from R1, Single Dwelling Residential to R3, Multiple Dwelling Residential, Zoning Ordinance and Reasoned Statement of Relevant Criteria and Standards for approximately 2.41 acres in Lots 4-5, Block 9, Lots 3-7, less a portion of lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No. 2, plus adjacent right-of-way.

Council Action Desired
☒ Ordinance ☐ Resolution ☒ Public Hearing
☐ Other Action (Approval, Authorization, Ratification, etc.)
1. Approve the Ordinance Rezoning approximately 2.41 acres in Lots 4-5, Block 9, Lots 3-7, less a portion of lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No. 2, plus adjacent right-of-way from R1, Single Dwelling Residential to R3, Multiple Dwelling Residential, under a suspension of the rules requiring three complete and separate readings and request that it be read by title and published by summary (or consider the Ordinance on the first reading and that it be read by title, reject the Ordinance, or take other action deemed appropriate).

2. Approve the Reasoned Statement of Relevant Criteria and Standards for the Rezone from R1 to R3 and give authorization for the Mayor and City Clerk to execute the necessary documents (or take other action deemed appropriate).

Description, Background Information & Purpose
Attached is the application for Rezoning approximately 2.41 acres in Lots 4-5, Block 9, Lots 3-7, less a portion of lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No. 2, plus adjacent right-of-way from R1 to R3, Zoning Ordinance, and Reasoned Statement of Relevant Criteria and Standards. The Planning and Zoning Commission considered this item at its March 4, 2025, meeting and unanimously voted to recommend approval of the zone change from R1 to R3 to the Mayor and City Council as presented.

Alignment with City & Department Planning Objectives



☐ ☒ ☒ ☐ ☒ ☐ ☒ ☐

The rationale for rezoning must be consistent with the principles of the Comprehensive Plan, which includes policies and goals related to Good Governance, Growth, Sustainability, and Livable Communities.

Interdepartmental Coordination
N/A

Fiscal Impact
N/A

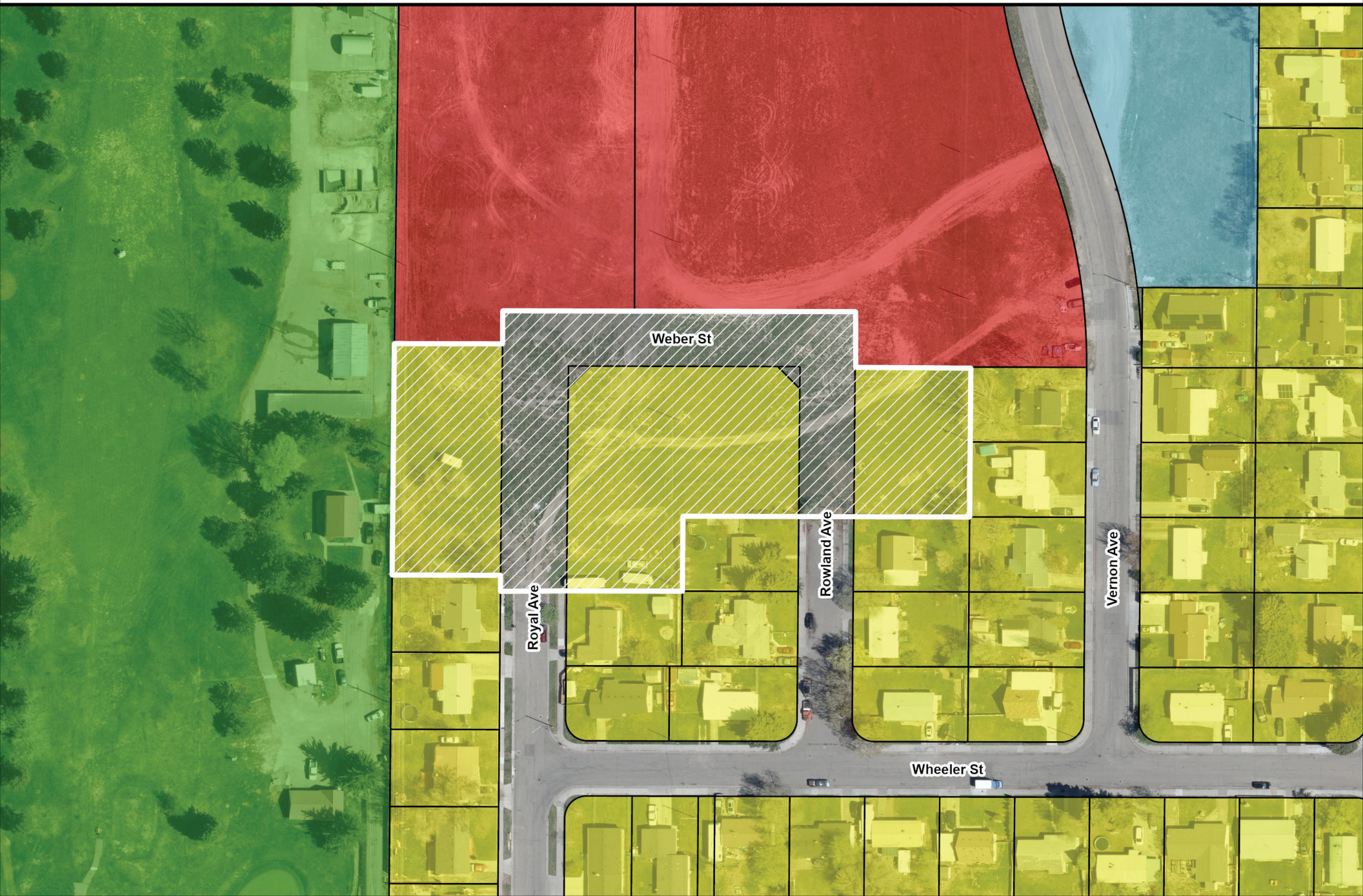
Legal Review
The application and ordinance have been reviewed by the Legal Department pursuant to applicable law.

Zoning

RZN25-002 2.41 A R1 to R3

RE | R1 | TN | R3 | PB | LC | R&D | I&M
RP | R2 | RMH | R3A | CC | HC | LM | P

N

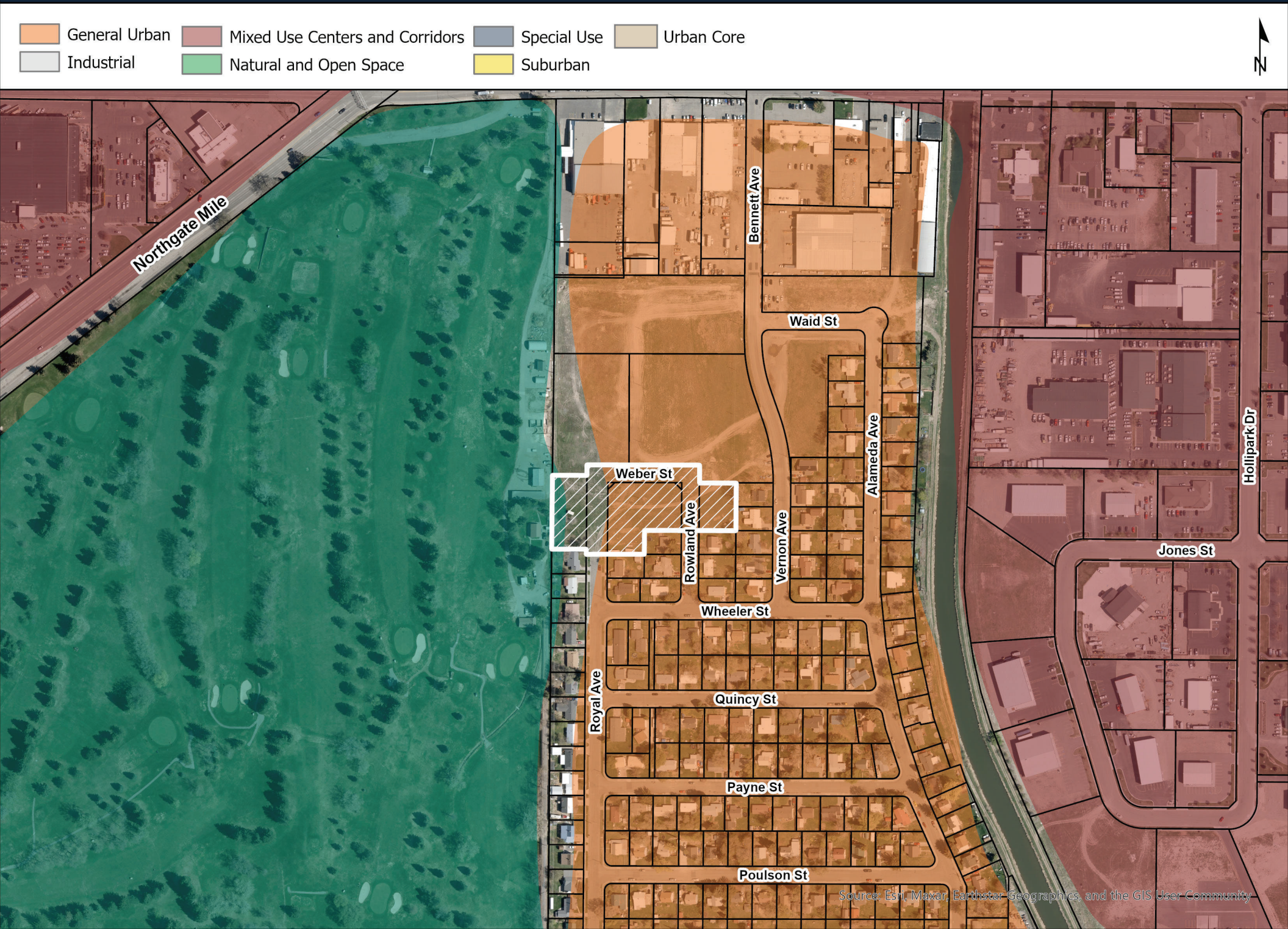


Aerial

RZN25-002 2.41 A R1 to R3

Comprehensive Plan

RZN25-002 2.41 A R1 to R3



STAFF REPORT

Rezone 2.41 Acres from R1, Single Dwelling Residential to R3, Multiple Dwelling Residentail

Lots 4-5, Block 9, Lots 3-7, less a portion of Lots 5 and 6, Block 10, Lots 10-12, Block 11 of Belaire Division No 2 plus adjacent right-of-way.

April 10, 2025

IDAHO FALLS

Community Development Services

Applicant: Connect Engineering

Owner: Sarthak Ohri

Project Manager: Naysha Foster

Location: Generally, north or Wheeler Street, east of Pinecrest Gold Course, south of Lincoln Road, west of Royal Avenue.

Size: Approximately 2.41acres, including adjacent ROW

Existing Zoning:
Site: R1
North: LC
South: R1
East: R1
West: P

Existing Land Uses:
Site: Vacant
North: Vacant
South: Residential

East: Residential
West: Recreation (Golf Course)

Future Land Use Map:
General Urban

Attachments:
1. Zoning Ordinance Information
2. Comprehensive Plan Policies
3. Maps and aerial photos

Requested Action: To approve the rezone from R1, Single Dwelling Residential to R3, Multiple Dwelling Residential.

History: This property was platted in 1950 and annexed into the City in 1951 with an initial zoning of Residential. A request to rezone the property from R1 to R2 was denied in 1978. This 1978 rezone was part of a larger area that included a commercial zoning request as well. It appears from the minutes that the Commission and neighbors had more concerns with the commercial zoning at the time that resulted in the denial. It has remained R1, since.

Staff Recommendation: Staff has reviewed the application and finds the request consistent with the Comprehensive Plan. While it does not meet all of the requirements of the Zoning Ordinance, staff feels it meets the intent for the reasons listed in the Staff Comments of this report. Staff and the Planning and Zoning Commission recommend approval of the rezone.

Staff Comments: The applicant submitted a complete application for the rezone on January 30, 2025. A neighborhood meeting was held according to section 11-6-8 of the Zoning ordinance. The requested zone is R3, Multiple Dwelling Residential. The property is not contiguous to R3 zoning, however there is a variety of different zoning districts in this area, which is consistent with the General Urban transect in the Comprehensive plan.

The General Urban Transect denotes residential areas with a mix of commercial and service uses convenient to residents. These areas contain a wide variety of housing types, generally including small single-units, duplexes, triplexes, fourplexes, courtyard apartments, bungalow courts, townhouses, multiplexes and live-work units. Lot sizes are smaller and more compact than suburban areas. These areas could also include parks, schools, churches and commercial services. These areas have highly connective street patterns, like the traditional grid-pattern that encourages bicycle and pedestrian usage. These areas should be near an existing or part of a new walkable center.

The existing R1 Zone would not allow the variety of housing types contemplated in the General Urban Transect. An R2 or higher designation is necessary construct housing units beyond single unit residential. The description of the General Urban Transect specifically lists Bel-Aire as an example.The property to the north is zoned LC, Limited Commercial. It's common for the zoning designation to transition from low density residential to higher density residential as you approach commercial areas.

Continue on page 2

The R3 zone provides a residential zone which is characterized by a variety of dwelling types with a denser residential environment. This Zone is situated along or near major streets such as collectors and arterials. It is also generally located near pedestrian connections and commercial services. Staff generally would not recommend higher density residential to travel through a lower density neighborhood to access the major street network. This property is located near Lincoln Road which is a principle arterial, and this area has the potential to be located near pedestrian connections to commercial services. The impact on the existing neighborhood is further reduced due to the smaller size lots which will limit the number of residential units that can be constructed. The R3 allows for single dwelling units and the R3 acts as a buffer between the R1 and LC Zone, transitioning from single dwelling units to commercial.

The average lot size for the residential lots in Bell-Aire Div 1 and 2 is 7,200 square feet. The minimum lots size in the R1 zone is 7,000 square feet. 11 lots out of 185 lots in Div 1 and 2 have been granted a variance for a reduction in setbacks. This highlights the difficulty in developing on these small lots. The applicant also indicates that they have discovered shallow lava rock on the property, which makes development challenging for single unit residential. Rezoning the property to R3 will provide more housing options for development of these lots.

Rezoning Considerations: Because the comprehensive plan provides only general guidance for zoning decisions, the Planning Commission shall also take the following considerations into account:

Criteria for Rezoning Section 11-6-5(I) of Ordinance	**Staff Comment**
The Zoning is consistent with the principles of City's adopted Comprehensive Plan, as required by Idaho Code.	The R3 zone is consistent with the General Urban transect in the City's adopted Comprehensive Plan.
The potential for traffic congestion as a result of development or changing land use in the area and need that may be created for wider streets, additional turning lanes and signals, and other transportation improvements	If the commercial development creates 200 trips during peak hour the City engineer will require a traffic study to determine alternative measures to alleviate traffic, including the extension of Weber street to the east connecting to Vernon Avenue. With the existing street network, development of these properties will require traffic to utilize the existing roads through the single unit residential neighborhood to come and go from the property. When zoning properties to a more intense zoning designation this should be kept to a minimum. Due to the small size lots the number of units that could be constructed will be kept to a minimum which shouldn't result in changes to the transportation network.
The potential for exceeding the capacity of existing public services, including, but not limited to: schools, public safety services, emergency medical services, solid waste collection and disposal, water and sewer services, other public utilities, and parks and recreational services	The small lot sizes will limit the number of residential units that could be constructed on the properties and therefore limit the potential for exceeding capacity in this area. Staff is also unaware of any capacity issues in this neighborhood.
The potential for nuisances or health and safety hazards that could have an adverse effect on adjoining properties	The provisions of the R3 standards, including but not limited to landscape buffers, will reduce the potential for nuisances or adverse effect on adjoining properties. The R3 will act as a

	buffer to reduce adverse impacts from the LC zone to the north.
Recent changes in land use on adjoining parcels or in the neighborhood of the proposed zoning map amendment	While the property is not contiguous to other R3 zoning there is a variety of different zones in the area which is consistent with the General Urban Transect of the Comprehensive Plan.
Zoning Application Questions:	**Applicant's Response:**
Explain how the proposed change is in accordance with the City of Idaho Falls Comprehensive Plan.	The proposed zone change aligns with the City's Comprehensive Plan, as the property is designated as General Urban, which is compatible with the R-3 zoning designation. Additionally, the property's location.
What changes have occurred in the area to justify the request for rezone?	Several changes in the area justify the request for a rezone. It was discovered that the property has very shallow lava rock, which makes development challenging for single-family residential use. Additionally, the properties adjacent to the site are zoned LC, and under the current City Comprehensive Plan, a buffer of high-density residential between commercial and lower-density residential zones is preferred. The proposed rezone to R-3 would provide this necessary buffer, aligning with the City's vision for balanced and functional land use in the area.
Are there existing land uses in the area similar to the proposed use?	Yes, they are just to the north is zoned LC and the area north of that property is currently used for Commercial and Light Industrial
Is the site large enough to accommodate required access, parking, landscaping, etc. for the proposed use?	Yes the site is large enough for the intended use after the rezone

Transportation Plan: Weber, Royal Rowland and Vernon Avenue are all local streets. Lincoln Road to the north is a principle arterial and to the south E Elva Street down to Garfield Street is a major collector.

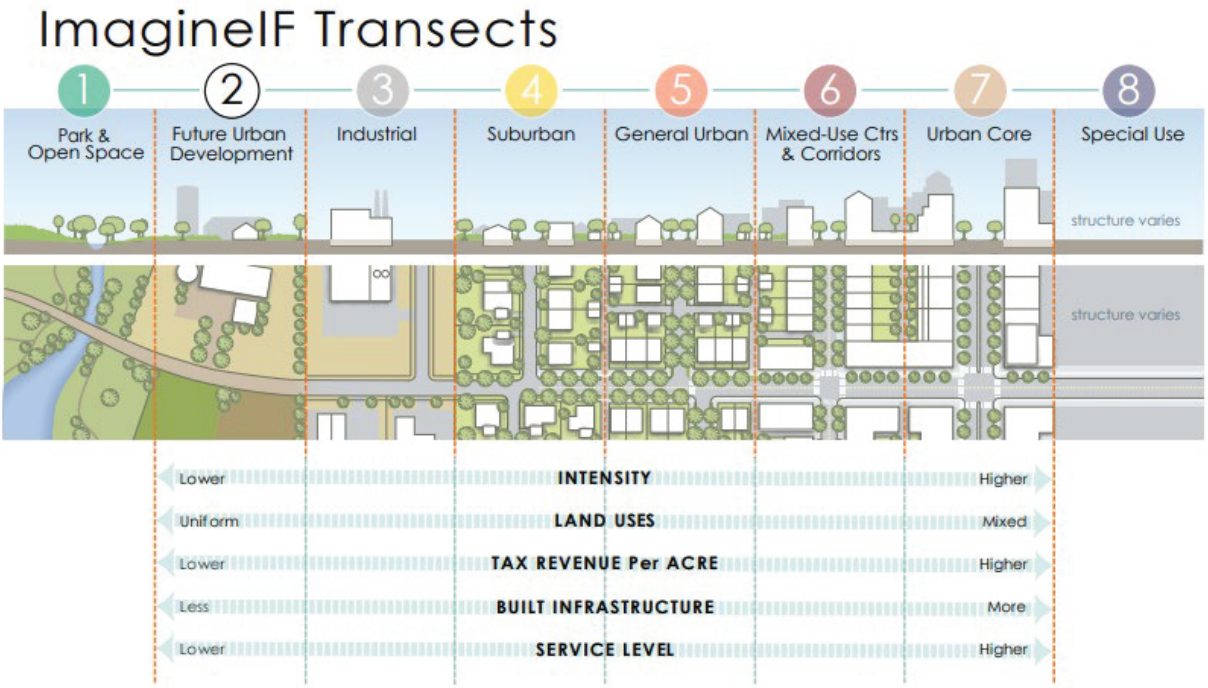
Zoning Ordinance:
11-3-3: PURPOSES OF RESIDENTIAL ZONES
(F) R3 Multiple Dwelling Residential Zone. This zone provides a residential zone which is characterized by a variety of dwelling types with a denser residential environment. This Zone is situated along or near major streets such as collectors and arterials. It is also generally located near pedestrian connections and commercial services.

11-3-4: DIMENSIONAL STANDARDS FOR RESIDENTIAL ZONES.

Table 11-3-1: Dimensional Standards for Residential Zones

	RE	RP	R1	R2	TN	R3	R3A	RMH
Lot Area								
Lot Area Minimum in ft^2	1 acre*	12,000	7,000	6,000*	3,000*	5,000*	5,000	3,000
Lot Area Maximum in ft^2			13,500*					
Site Width								
Site Width at Front Setback, Minimum in ft.	150	60	50	50	25	50	50	25
Setbacks, Minimum in ft.								
Front	40	30*	25*	20*	15*	15	15	15
Front Maximum in ft.					20*			
Side	20	7.5/10*	6	6	5	6	6	5
Rear	40	25	25	25	10	25*	25*	10
Lot Coverage, Building Height, and Density								
Maximum Lot Coverage in %	30	40	40	80	50	80	80	50
Maximum Building Height in ft*	24	24	24	36	*			24
Maximum Density in gross units/acre	1	4	6	17	15	35	35	35
*See explanations, exceptions and qualifications in Section 11-3-4A,B,C of this Zoning Code.								

Comprehensive Plan Policies:



5. **General Urban**

Snapshot: The General Urban Transect denotes residential areas with a mix of commercial and service uses convenient to residents. These areas contain a wide variety of housing types, generally including small single-units, duplexes, triplexes, fourplexes, courtyard apartments, bungalow courts, townhouses, multiplexes and live-work units. Lot sizes are smaller and more compact than suburban areas. These areas could also include, parks, schools, churches and commercial services. These areas have highly connective street patterns, similar to the traditional grid-pattern that encourages bicycle and pedestrian usage. These areas should be near an existing or part of a new walkable center.

Local examples: Bonnavista Addition, Johns Height Subdivision, Jennie Lee Addition, Bell-Aire, Linden Park, Linden Trails, Falls Valley

March 4, 2025 7:00 p.m. Planning Department

City Annex Council Chambers

MEMBERS PRESENT: Commissioners Arnold Cantu, Bill Scott, Forrest Ihler, Matthew Meehan.

MEMBERS ABSENT: Marsha McDaniel, Dale Storer, Glen Ogden.

ALSO PRESENT: Assistant Planning Director Kerry Beutler, Naysha Foster Planner, Caitlin Long Planner, Brian Stevens Planner; Jacob Beck, Esq, City Attorney, and interested citizens.

CALL TO ORDER: Ihler called the meeting to order at 7:00 p.m.

MINUTES: Scott moved to accept the minutes of February 4, 2025, Meehan seconded the motion. The motion passed unanimously.

Public Hearings:

4.RZN 25-002: REZONE FROM R1 TO R3.

Ogden opened the public hearing.

Applicant: Barry Bane, Connect Engineering, 2295 N. Yellowstone, Suite 6, Idaho Falls, Idaho. Bane stated that this property is south of Lincoln, and east of the golf course. Bane indicated that on the Comprehensive Plan Map this designation is for general urban transect and the current zone is R1 and part of the Belaire Neighborhood. There is (LC) commercial next to single family residential. Bane stated that there are properties in the area that follow the step zoning plan, and that is the same transition they are looking for going from R1, to R3 to LC. The lots are 2.4 acres. They held a neighborhood meeting, and one neighbor came to the meeting and had concerns of traffic and access to their lot while construction is happening. Bane stated that there was also concern about rock and how do they blast or chip. The developer will have an interesting time removing rock. The zone change allows for this piece of infill to develop. They had a predesign meeting with the City and discussed continuing the road that loops and continue the road out so the higher density lots do not go through the single-family subdivision to get out to Vernon. The Comprehensive Plan denotes it as a mix of commercial and service uses with connectivity to residential and contain a diverse housing type. The R1 zone makes it hard to meet the general urban designation and the R3 falls in line better with the Comprehensive Plan designation. There are some walkability factors near the property.

Scott asked if the problems with the rock would affect the development and what do they have to do to develop (blasting?). Bane stated that the developer will have to build the road and extend utilities, and the struggle comes through getting utilities (sewer/water). The City doesn't designate how they do it, and the contractor and developer do the most cost-effective way to get the rock out. Bane is not sure if they would blast in this area or whether they would chip. Scott asked if the concern by the neighbors the noise/dust more so than would be expected with consideration of the rock in the area. Bane stated that there is potential for more disturbance when rock is involved. Bane stated that regardless of the zone the road will have to be put in and the rock will be a problem.

Meehan asked if it is an issue of economic feasibility and that is the need for the rezone. Bane agreed that it is expensive and cannot economically work out to do single family homes.

Foster presented the staff report, a part of the record.

Ihler asked if the extension of Weber would be planned during the preliminary plat stage. Foster stated that it would require a final plat. Ihler stated that if it is zoned R3 it needs to have better access to Vernon. Ihler stated that if the plat came out and didn't have the extension of Weber can they discuss that. Ihler stated that final plats are often the same as preliminary plats. Ihler would like to see it on the preliminary plat stage. Foster stated that it could be done in a preliminary plat, but it might not require a preliminary plat. Foster stated that a preliminary plat shows more street network and this is just a small network.

Meehan wanted to be clear that this is not to combine the 3 squares into one lot. Foster agreed that there are 10 lots in the area that are being rezoned as well as the right of way. Meehan asked about Royal and Rolland and are they going to be extended. Foster stated that it is already platted right of way and the developer will have to finish construction all 3 (Royal, Rolland and Weber) roads.

Support/Opposition: No one appeared.

Ihler closed the public hearing.

Ihler likes the idea and feels R3 makes sense. Residential buildings in LC are held to R3A standards. R3 is purely residential, and no commercial allowed. Ihler feels that infill is good, and this is a good start to fill up property in the City. Ihler feels that economically they will have to raise the density to make this work economically.

Meehan stated he agrees with Ihler and his concern is directing higher density traffic through lower density neighborhood and if Weber Street is completed as part of the development it takes his concerns away.

Meehan moved to recommend to the Mayor and City Council approval of the Rezone from R1 to R3. Storer seconded the motion. Ihler called for roll call vote: Scott, yes; Cantu, yes; Ihler, yes; Meehan, yes. The motion passed unanimously.

ORDINANCE NO._____

AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; PROVIDING FOR THE REZONING OF APPROXIMATELY 2.41 ACRES AS DESCRIBED IN SECTION 1 OF THIS ORDINANCE FROM R1, SINGLE DWELLING RESIDENTIAL TO R3, MULTIPLE DWELLING RESIDENTIAL; AND PROVIDING SEVERABILITY, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE.

WHEREAS, the proposed zoning district of lands described in Section 1 is R3 Zone for such annexed lands and such zoning is consistent with the current City of Idaho Falls Comprehensive Plan Land use designation General Urban; and

WHEREAS, the proposed zoning district is consistent and compatible with the existing and surrounding zoning districts and is consistent with the City of Idaho Falls Comprehensive Plan; and

WHEREAS, Idaho Falls Planning and Zoning Commission held a duly noticed public hearing on March 4, 2025, and recommended approval of zoning the subject property to R3 Zone; and

WHEREAS, the Idaho Falls City Council conducted a duly noticed public hearing and passed a motion to approve this zoning on April 10, 2025.

NOW THEREFORE, BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE CITY OF IDAHO FALLS, IDAHO, AS FOLLOWS:

SECTION 1: LEGAL DESCRIPTION:

This ordinance shall apply to the following described lands in Idaho Falls, Idaho, Bonneville County, to-wit:

Approximately 2.41 acres, Lots 4-5, block 9, Lots 3-7, less a portion of Lots 5 and 6, block 10, Lots 10-12, Block 11 of Bel-Aire Division No 2 and the adjacent right-of-way.

SECTION 2. Zoning. That the property described in Section 1 of this Ordinance be and the same hereby is zoned “R3 Zone" and the City Planner is hereby ordered to make the necessary amendments to the official maps of the City of Idaho Falls which are on file at the City Planning Department Offices, 680 Park Avenue.

SECTION 3. Savings and Severability Clause. The provisions and parts of this Ordinance are intended to be severable. If any section, sentence, clause or phrase of this Ordinance should be held to be invalid or unconstitutional by a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause or phrase of this Ordinance.

SECTION 4. Publication. This Ordinance, or a summary thereof in compliance with Idaho Code, shall be published once in the official newspaper of the City, and shall take effect immediately upon its passage, approval, and publication.

SECTION 5. Effective Date. This Ordinance shall be in full force and effect from and after its passage, approval and publication.

PASSED by the City Council and APPROVED by the Mayor of the City of Idaho Falls, Idaho, this_____day of_____, 2025.

CITY OF IDAHO FALLS, IDAHO

_____
Rebecca L. Noah Casper, Mayor

ATTEST:

_____
Emily Geisler, City Clerk

(SEAL)

STATE OF IDAHO)
) ss:
County of Bonneville)

I, EMILY GEISLER, CITY CLERK OF THE CITY OF IDAHO FALLS, IDAHO, DO HEREBY CERTIFY:

> That the above and foregoing is a full, true and correct copy of the Ordinance entitled, "AN ORDINANCE OF THE CITY OF IDAHO FALLS, IDAHO, A MUNICIPAL CORPORATION OF THE STATE OF IDAHO; PROVIDING FOR THE REZONING OF APPROXIMATELY 2.41 ACRES AS DESCRIBED IN SECTION 1 OF THIS ORDINANCE FROM R1, SINGLE DWELLING RESIDENTIAL TO R3, MULTIPLE DWELLING RESIDENTIAL; AND PROVIDING SEVERABILITY, PUBLICATION BY SUMMARY, AND ESTABLISHING EFFECTIVE DATE."

_____
Emily Geisler, City Clerk

REASONED STATEMENT OF RELEVANT CRITERIA AND STANDARDS

ZONE CHANGE FROM R1, SINGLE DWELLING RESIDENTIAL TO R3, MULTIPLE DWELLING RESIDENTIAL, GENERALLY LOCATED NORTH OF WHEELER STREET, EAST OF PINECREST GOLF COURSE, SOUTH OF LINCOLN ROAD, WEST OF ROYAL AVENUE

WHEREAS, the applicant filed a complete application for a rezone on January 30, 2025; and

WHEREAS, this matter came before the Idaho Falls Planning and Zoning Commission during a duly noticed public hearing on March 4, 2025; and

WHEREAS, this matter came before the Idaho Falls City Council during a duly noticed public hearing on April 10, 2025; and

WHEREAS, having reviewed the application, including all exhibits entered and having considered the issues presented:

I. RELEVANT CRITERIA AND STANDARDS

1. The City Council considered the request pursuant to City of Idaho Falls Comprehensive Plan, City of Idaho Falls Zoning Ordinance, the Local Land Use Planning Act, and other applicable development regulations.
2. The property is approximately 2.41 acres generally located north of Wheeler Street, east of Pinecrest Golf Course, south of Lincoln Road, west of Royal Avenue.
3. The Comprehensive Plan designates this area as General Urban.
4. The proposed zoning of R3 is consistent with the Comprehensive Plan map and policies.
5. Idaho Falls Planning and Zoning Commission recommended approval of zoning of the property to R3, Multiple Dwelling Residential.
6. The R3, Multiple Dwelling Residential acts as a buffer between R1, Single Dwelling Residential and the LC, Limited Commercial to the north.
7. While the property is not contiguous to other R3, Multiple Dwelling Residential zoning, there is a variety of different zones in the area which is consistent with the General Urban Transect of the Comprehensive plan. The General Urban Transect specifically lists Bel-Aire as an example of the General Urban Transect, which denotes a residential area with a wide variety of housing types that generally include small single-units, duplexes, triplexes, multiplexes and live works units on smaller lots that are more compact than a suburban area.
8. The existing R1 Zone would not allow the variety of housing types contemplated in the General Urban Transect. An R2 or higher designation is necessary construct housing units beyond single unit residential.
9. The impact on the existing neighborhood is reduced due to the smaller size lots which will limit the number of residential units that can be constructed. The R3 Zone will act as a buffer between the R1 and LC Zone, transitioning from single dwelling units to commercial.
10. Several variances have been granted in the neighborhood highlighting the difficulty in developing on these small lots. The applicant also indicates that they have discovered shallow lava rock on the property, which makes development challenging for single unit residential uses. Rezoning the property to R3 will provide more housing options for development of these lots.

II. DECISION

Based on the above Reasoned Statement of Relevant Criteria, the City Council of the City of Idaho Falls approved the change of zoning as presented.

PASSED BY CITY COUNCIL OF THE CITY OF IDAHO FALLS

THIS _____ DAY OF _____, 2025

_____

Rebecca L. Noah Casper - Mayor

2295 N Yellowstone Hwy STE #6
Idaho Falls, Idaho 83401
(208) 881-0081

January 7, 2025
Re: Rezone Application

Dear Property Owner,

The purpose of this letter is to inform you of a property within 300' of your property that is in the planning stages of development. The property is generally located at the end of Royal Avenue and the end of Rowland Avenue. We have included a map highlighting the property in question. The property is 1.620 acres and the proposed rezone is from R1 (Single Family Residential) to R3 (Multiple Dwelling Residential).

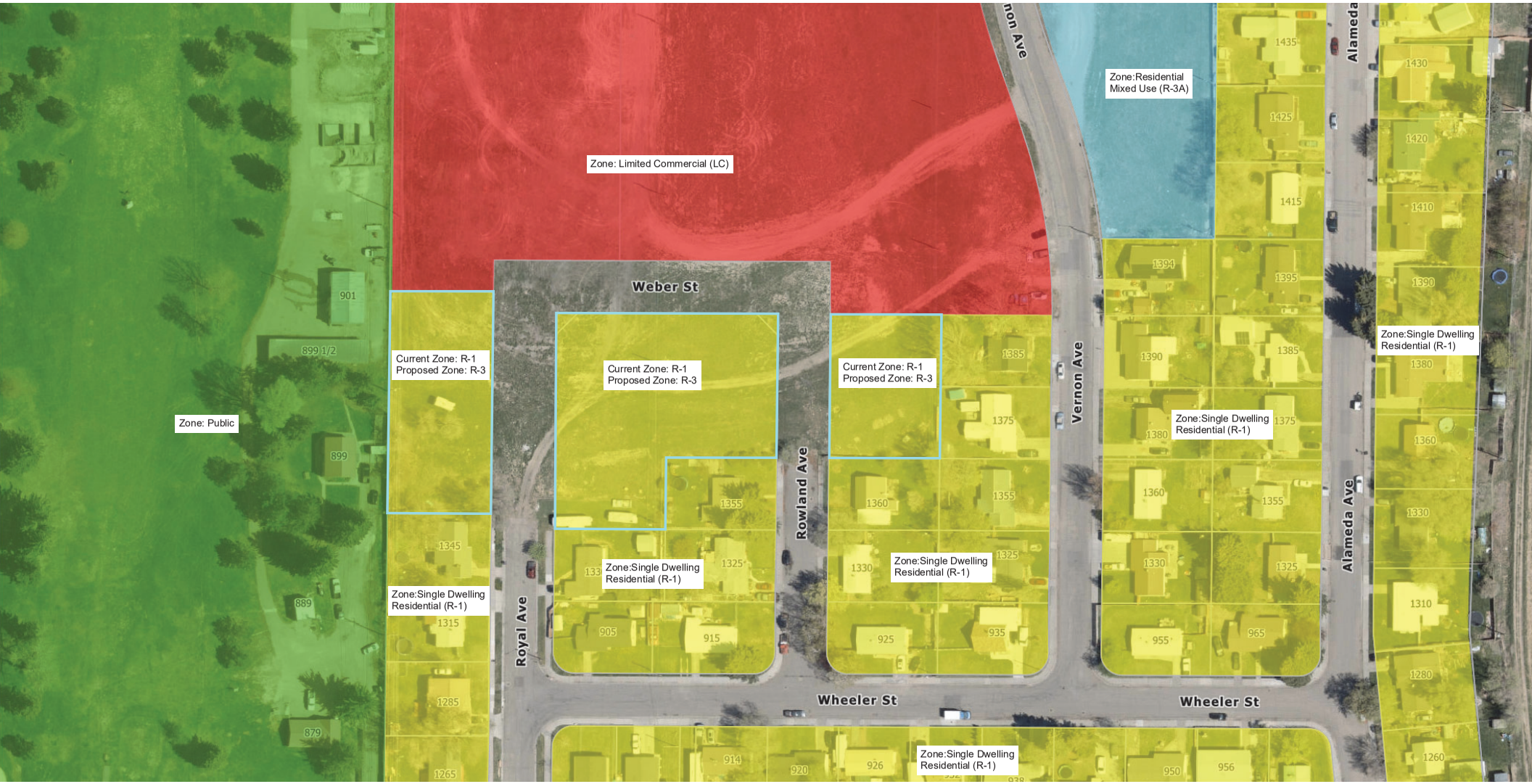
We would like to invite you to attend a Neighborhood Information Meeting to provide you an opportunity to become aware of the rezone intentions as well as to give you an opportunity to voice any questions or concerns you may have and to become better informed regarding the proposed rezone.

The Neighborhood Information Meeting will be held on Monday, January 20th, 2024, at Connect Engineering's Idaho Falls office, located at 2295 N Yellowstone Hwy Suite #6. This meeting will be held from 5:00 PM to 6:00 PM and will be led by Travis Payne. Please notify us via email at admin.eng@connectengr.com if you plan on attending to make sure we can accommodate everyone who wants to attend.

Respectfully,

The Connect Engineering Team

Travis Payne
2295 N Yellowstone Hwy STE #6
Idaho Falls, ID 83401
tpayne@connectengr.com
(208) 881-0081


Zone: Limited Commercial (LC)
Zone:Residential Mixed Use (R-3A)
Weber St
Current Zone: R-1
Proposed Zone: R-3
Current Zone: R-1
Proposed Zone: R-3
Current Zone: R-1
Proposed Zone: R-3
Zone: Public
Zone:Single Dwelling Residential (R-1)
Zone:Single Dwelling Residential (R-1)
Zone:Single Dwelling Residential (R-1)
Zone:Single Dwelling Residential (R-1)
Zone:Single Dwelling Residential (R-1)
Zone:Single Dwelling Residential (R-1)
Royal Ave
Rowland Ave
Vernon Ave
Alameda Ave
Wheeler St
Wheeler St
901
899 1/2
899
889
879
1345
1315
1285
1265
1355
1325
905
915
1385
1375
1360
1355
1330
1325
925
935
1394
1390
1385
1380
1375
1360
1355
1330
1325
955
965
1435
1425
1415
1430
1420
1410
1390
1380
1360
1330
1310
1280
1260
914
920
926
950
956

Owner	Additional Owner	Mailing Address	Mailing City Mailing State Mailing Zip Code
CITY OF I F		PO BOX 50220	IDAHO FALLS, ID 83405
LATER SHANE	LATER RACHAEL S	906 WHEELER ST	IDAHO FALLS, ID 83401
SHIVERS JAMES THOMAS	SHIVERS REBECKA	4825 BLACKSTONE DR	IDAHO FALLS, ID 83404
VALLO JAKE		915 QUINCY ST	IDAHO FALLS, ID 83401
LUGO SHEEYLA		944 WHEELER ST	IDAHO FALLS, ID 83401
ARMSTRONG ARLENE	ARMSTRONG HOWARD	5951 TROWBRIDGE WAY	SALT LAKE CITY, UT 84118
GONZALEZ CHRISTINA		932 WHEELER ST	IDAHO FALLS, ID 83401
RAMOS-GOMEZ LEONEL F		926 WHEELER ST	IDAHO FALLS, ID 83401
GORDON CHEYANNE	ROBLES EDWIN HARED ALBANCANDO	920 WHEELER ST	IDAHO FALLS, ID 83401
HODSON DAVID		914 WHEELER ST	IDAHO FALLS, ID 83401
STAUFFER JULIE ANN		955 WHEELER ST	IDAHO FALLS, ID 83401
CLAWSON JOHN REESE JR	CLAWSON MELANIE	1330 VERNON AVE	IDAHO FALLS, ID 83401
JONES TYLER		1360 VERNON AVE	IDAHO FALLS, ID 83401
WHITAKER MARY LOU	WHITAKER WARREN KELLY	1380 VERNON AVE	IDAHO FALLS, ID 83401
DIAZ REYES		1390 VERNON AVE	IDAHO FALLS, ID 83401
CRUZ HERI J		1385 ALAMEDA AVE	IDAHO FALLS, ID 83401
FARNES JANET C	FARNES JEFFREY DEAN	3269 S 65TH W	IDAHO FALLS, ID 83402
HAMMON KRYSTIAN	BAKER ABIGAIL M	1355 ALAMEDA AVE	IDAHO FALLS, ID 83401
MERRILL SAM	MERRILL STEPHANIE L	3977 E BARON CIR	RIGBY, ID 83442
RAMIREZ MARGARITO MEDINA	LONA MARIA VERONICA ESTRADA	965 WHEELER ST	IDAHO FALLS, ID 83401
MONTOYA LUIS		925 WHEELER ST	IDAHO FALLS, ID 83401
MOULTON KATIE		1330 ROWLAND AVE	IDAHO FALLS, ID 83401
BRITTON DANIEL JAMES		1360 ROWLAND AVE	IDAHO FALLS, ID 83401
MANWARING LIVING TRUST		1431 S WOODRUFF AVE	IDAHO FALLS, ID 83404
LAKE JOHN		1385 VERNON AVE	IDAHO FALLS, ID 83401
FLORES JAIME	FLORES GAIL L	1375 VERNON AVE	IDAHO FALLS, ID 83401
MCINNES TAITUM S		1355 VERNON AVE	AMMON, ID 83401
HARRIS LORIN F & CATHY FAMILY TRUST		1997 E 200 N	REXBURG, ID 83440
THOMAS PATRICK		935 WHEELER ST	IDAHO FALLS, ID 83401
POOLE DARWIN D		905 WHEELER ST	IDAHO FALLS, ID 83401
KENNEY MARSHALL A	KENNEY TAUSHA M	1330 ROYAL AVE	IDAHO FALLS, ID 83401
MANWARING LIVING TRUST		1431 S WOODRUFF AVE	IDAHO FALLS, ID 83404
CITY OF IDAHO FALLS		PO BOX 50220	IDAHO FALLS, ID 83405-0220
CITY OF IDAHO FALLS		PO BOX 50220	IDAHO FALLS, ID 83405-0220
SORENSON REDGE		4468 N SUNRISE LN	IONA, ID 83427
AVILA YERED E ORTEGA		1325 ROWLAND AVE	IDAHO FALLS, ID 83401
JONES ALICIA		915 WHEELER ST	IDAHO FALLS, ID 83401
HANOSKY SKYLER	HANOSKY RYLER GUSTAVE	591 E FLANNAGON ST	IDAHO FALLS, ID 83402
BENNS SARAH		1265 ROYAL AVE	IDAHO FALLS, ID 83401
JACKSON MARK S	JACKSON NATASHA BETH	1285 ROYAL AVE	IDAHO FALLS, ID 83401
ALEMAN REINA E ECHEVERRIA	ALEMAN JOSE E & REINA E ECHEVERRIA DE ALEMAN LIFE ESTATE	427 S 500 W	TREMONTON, UT 84337
PERRENOUD RYAN		1345 ROYAL AVE	IDAHO FALLS, ID 83401
MANWARING LIVING TRUST		1431 S WOODRUFF AVE	IDAHO FALLS, ID 83404
VENEGAS DEMITRIO		1395 ALAMEDA AVE	IDAHO FALLS, ID 83401
LOPEZ HIRAM PONCE		1415 ALAMEDA AVE	IDAHO FALLS, ID 83401
FLORES ABRIL EUNICE MEDINA	CISNEROS EDUARDO RAFAEL MEDINA	1425 ALAMEDA AVE	IDAHO FALLS, ID 83401
SEGURA MARTHA ROSALIA MALDONADO		1394 VERNON AVE	IDAHO FALLS, ID 83401
CITY OF IDAHO FALLS		PO BOX 50220	IDAHO FALLS, ID 83405-0220
CITY OF IDAHO FALLS		PO BOX 50220	IDAHO FALLS, ID 83405-0220
CITY OF IDAHO FALLS		PO BOX 50220	IDAHO FALLS, ID 83405-0220

Neighborhood Meeting

5:00 PM | Monday, 01/20/2025

Name :	Address :	Phone # :
Kenney's	1330 Royal Ave.	208-313-1802 or 569-1184
Charlotte		208 701-8264
Sar Ohni		208-985-8922

CONNECT ENGINEERING
208-881-0081
2295 N Yellowstone Hwy Unit 6
Idaho Falls, ID 83401

Project Name: Bel-Aire Div 2	Project Number: 2025-002
Subject: Neighborhood meeting notes	Date: 01/21/2024

The neighborhood meeting was held at the Connect Engineering offices, located at 2295 N Yellowstone Hwy, Suite 6, Idaho Falls, Idaho 83401, at 5:00 PM on January 20, 2025.

Meeting notifications were distributed via postal service on January 06, 2025.

In attendance were Mr and Mrs Kenney from the community. Sar Ohri and Charlotte Cook were also present representing the developer along with members of the Connect Engineering team.

During the neighborhood meeting, the Kenney family expressed several concerns regarding the proposed development, including increased traffic, managing lava rock during construction, the extension of sewer and water services, the need for a landscape buffer to separate their home from the new development, and ensuring unobstructed access to their private drive. Each of these concerns was addressed by the Connect Engineering team and the developer, based on previous conversations with the City, while ensuring all solutions adhered to City code requirements.