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**From the City Manager:** Here are a few updates from this week...

**Doug’s Article on First Amendment Issues:** We were proud to read an article written by our Deputy City Attorney, Doug Hoffer, in one of municipal law sector’s key professional journals. The article, entitled “Municipalities and the First Amendment: Free Speech, Religion, and Public Audits” discusses recent developments in First Amendment law and provides information for attorneys who advise local governments on laws and practices impacting speech and religion. It even includes a discussion related to recent trends experienced first-hand at City Hall, like how to welcome First Amendment Auditor visitors to the workplace. The article can be read at <https://imla.org/wp-content/uploads/2022/09/ML-SEPTEMBER-OCTOBER-2022-DIGITAL-FINAL-9-7-2022.pdf>

Reading through the expert advice is a reminder that municipal law keeps changing. It’s highly specialized and getting the arcane details right or wrong makes a huge impact on the City’s well-being. It’s hard to understate how much of an asset it is to have our most awesome legal team helping us handle both the day-to-day and less common situations we encounter.

**Transfer Station Update:** You may have seen or read WQOW’s story on the Transfer Center opening date. The project has proven to be extremely complicated, due to the different sources of funding and their requirements and the complexity of trying to build (and negotiate the terms of) housing on top of the station and parking decks. Even baseline, the project would’ve been complicated. However, Covid and inflation have further tested its path forward. We will work with neighboring businesses to try to reduce the impact of ongoing construction on their businesses, and we will share updates with the Council as we determine options with regard to completing the housing component of the project. See here for the update: [Transfer Center opening delayed to 2024 despite bulk of construction being on schedule | Eye On Eau Claire | wqow.com](#)

**Budget Preparation:** Please see the updated Council calendar below for new dates in November. Because the referendum will be decided the very same day the Council normally approves the budget,

we need to push off the Council action on the budget until a subsequent meeting, and we have added a meeting on November 15th.

Also note, we will be seeking your approval of the CIP at the September 27th Council meeting, with a Public Hearing the night before, so as to move ahead with finalizing the Operating Budget. Firming up the transfers from the general fund to the CIP is required to finalize the Operating Budget.

**Bond Rating:** Attached to the newsletter is a press release from Moodys on the City's most recent bond rating. Our bond rating remains the same, at Aa(2). Moodys lists two primary concerns that will either keep our rating at the Aa(2) level, which is lower than some of our peers, or potentially push the rating lower next year or in subsequent years. Our bond rating is a key metric of financial health of the City, and it affects the cost of our borrowing. From Moodys' release:

#### Credit challenges

- » Elevated leverage with high fixed-costs
- » Limited revenue-raising flexibility because of state-imposed levy limits [Moodys.com](https://www.moodys.com):

We will need to focus on how much we borrow to manage the credit challenge that the rating flags.

**City Manager Office Staffing Recruitment:** After working with HR and other Directors, we have reconfigured some of the positions in the City Manager's Office. We are currently recruiting for three positions that will cover most of the administrative, project management, community outreach and coordination, and Council support tasks of the City Manager's Office. With Carrie transitioning to HR, the City Clerk position will also be posted in coming weeks, along with the EDI Coordinator. We are excited about the capacity we are building to tackle the biggest challenges, such as housing and equity gaps, to support organizational learning within and across the city, and to share with you all and the public an increased understanding of the nuts and bolts of all departmental operations. Thank you in advance for bearing with our office as we wear multiple hats while we await the selection on onboarding of new staff. See here for more information on the positions: [Job Openings | Sorted by Posting Date descending | JOB OPENINGS \(governmentjobs.com\)](#)

In case you'd like to learn more about the performance management model that we hope to implement, please plan to join in on a discussion about performance management that will be held on Wednesday, September 28, from 11AM to noon (12 to 1PM East Coast Time). It's with the former Mayor I worked with, and one of the SomerStat Directors. More info is here: [Lunchtime Study Group: Co-Creating Local Government Session 2: Lifting up the Hood on Local Government | Ash Center \(harvard.edu\)](#)

**Utility Achievement Award Winner:** We are proud to share that the WI AWWA Water Utility Achievement Award will be going to Eau Claire Waterworks, and Lane Berg and perhaps other staff will travel to accept the award. The award is related to the interim voluntary PFAS work the utility

performed to reduce PFAS. Info about the upcoming conference and the schedule is at the links below.  
<https://www.wiawwa.org/page/AnnualConference>

**Opportunities for Council:** Just a reminder... please consider joining in on one of these events to participate in the work of the City...

- **Road-eo Helpers:** Sign up to help for a shift or longer to “judge” the driving maneuvers of City and County employees. For more information and to register, click: [City of Eau Claire Employees: City/County Snowplow ROADeo \(signupgenius.com\)](#)
- **Clearwater Parade Float:** Plan to organize a float in this winter’s Clearwater Parade, which will be held on December 2nd. Contact the Recreation Department for more information [recreation@eauclairewi.gov](mailto:recreation@eauclairewi.gov).

**Housing-Related Updates:** As part of Tuesday’s City Council meeting, we will provide brief updates on housing-related projects in process for the City, including updates on:

- The Housing Needs Assessment RFP (see attached);
- Plans for the ARPA-funded zoning overhaul;
- The Housing Opportunities Commission’s plans for a fall conference;
- DECI’s plans for an Ideal Lounge focused on addressing issues related to people experiencing homelessness;
- Initial efforts of Housing Outreach Team; and
- Creation of a Performance Management team to handle coordination and tracking related to housing and homelessness, along with adding capacity in other parts of the County and system.

My goal is to test out an approach at Council meetings in which City Administration shares out information and updates on key issues, and, because the topics are posted as part of the agenda, the Council can ask questions or provide input.

**Vaccine Updates:** The Health Department reports that they are in the process of receiving the new booster vaccine sometime at the end of this week or early next. They are finalizing a plan for their regular vaccine clinics, plus the new vaccine. They have announced that “The Health Dept is now accepting appointments and walk-ins for the bivalent vaccine. This vaccine targets Omicron and the original virus strain.” See here: [COVID-19 Vaccine Appointments | Coronavirus and COVID-19 Information Hub \(arcgis.com\)](#) More information will be forthcoming as planning continues.

**Employee Spotlight:** Here’s our next spotlight! (Give a shout-out to a City employee using this form: [Spotlight Form](#)).

This week’s spotlight is for **Gina Holt**...

Gina's co-workers said this about Gina: *"Gina is a wonderful person to work with at the Health Department. She has a positive attitude, goes out of her way to help our clients and other employees, and is always on the lookout to help make our office run more efficiently. Co-workers have shared the following comments – 'I want you to know that I feel very fortunate to have G. H. working for us' and 'Gina is always ready to assist with any request, whether large or small. Her attitude is very positive, she is thoughtful and always looking for ways to make improvements.'" We also recently received a letter from a client that stated, 'You have an amazing employee in Gina. She is kind, compassionate, and very helpful.' Additionally, 'Gina takes the time to make others feel valued and is always ready to share a good laugh!'"*



Here's a little bit more about Gina:

- Position: "I just celebrated my 10-year anniversary at the City as a Program Specialist."
- What people may not know: "I was right-handed until 1<sup>st</sup> grade when I decided to switch to my left hand."
- Favorite Activity: "I love anything outdoors hiking, boating, bike riding, swimming."
- Best part about working for the City: "The most amazing humans work at the Health Department, and I enjoy being able to spend time with them each week."
- Anything else? "I love to laugh, and my loud cackle can often be heard throughout the Department."

### **Council Calendar**

- Monday, September 12th: No meeting
- Tuesday, September 13th: Regular Council Meeting
- ❖ *Tuesday, September 20th: DOR certifies percent change in Consumer Price Index*
- Monday, September 26th: Regular Council Public Hearing/Discussion night
  - o Public Hearing on the Proposed 2023-2027 Capital Improvement Planning Budget
- Tuesday, September 27th: Regular Council Meeting
  - o City Council action on 2023-2027 Capital Improvement Planning Budget
  - o Check-in between City Manager and Council
- ❖ *Saturday, October 1st: City Council receives 2023 Proposed Operating Budget*
- Tuesday, October 4th: Special Council Meeting - Operating Budget work session #1
- Monday, October 10th: Regular Council Public Hearing/Discussion night
  - o First Public Hearing on the Proposed 2023 Operating Budget
- Tuesday, October 11th: Regular Council Meeting

- o Operating Budget work session #2
- Tuesday, October 18th: Special Council Meeting - Operating Budget work session #3
- ❖ *Tuesday, October 18th: Budget amendments due*
- Monday, October 24: Regular Council Public Hearing/Discussion night
- Tuesday, October 25th: Regular Council Meeting
  - o Operating Budget work session – amendment discussion
- Monday, November 7th: Regular Council Public Hearing/Discussion night
  - o Second Public Hearing on 2023 Proposed Operating Budget
- ❖ *Tuesday, November 8th: General Election, with referendum ballot question*
- Tuesday, November 8th: Regular Council Meeting
- Tuesday, November 15th: Special Council Meeting
  - o City Council action on 2023 Proposed Operating Budget
- Monday, November 21st: Regular Council Public Hearing/Discussion night
- Tuesday, November 22nd: Regular Council Meeting
  - o City Council action on 2023 Proposed Operating Budget (if not completed sooner)
  - o City Council action on levy
- ❖ *Tuesday, November 22nd: Deadline for Council action on 2023 budget and Levy*

**Additional Dates**

- HERE Conference, 9/15-9/17
- Road-eo: 9/20 and 9/21
- Regional Wisconsin League of Cities Meeting, 9/22: <https://www.lwm-info.org/1677/Fall-Regional-Meetings>
- Wisconsin League of Cities Annual Conference, 10/19-10/21
- City Bus Tour: Dates in September and October. Please let me or Alia Johnson ([alia.johnson@eauclairewi.gov](mailto:alia.johnson@eauclairewi.gov)) know if you'd like to join in on a tour, if space is available.
- Clearwater Parade: 12/2

**Police Update:**

**Meet ECPD's Therapy Dog, K9 Murphy!** K9 Murphy is a five-month-old Australian Labradoodle who was graciously donated by Blueberry Cottage Labradoodles. K9 Murphy will serve an important role within the police department. He will assist to provide comfort to people during times of crisis. This includes individuals, groups, City of Eau Claire personnel, and communities impacted by violence, tragedy or traumatic events. K9 Murphy will



also help foster dialogue and communication between our agency and the community we serve, along with being present at local and community events.

So far, K9 Murphy has completed two puppy obedience trainings at *Embark* and *Barks & Rec EC*. Later this month, K9 Murphy will attend a two-week *Board & Train* training program at *Barks & Rec EC* where he will receive multiple training sessions daily to work on obedience, socialization, and fundamentals to prepare for future therapy dog training.

K9 Murphy is available to visit all City of Eau Claire work groups. Please reach out to Lieutenant Ben Frederick if you are interested in utilizing his services.

**Engaging With the Community:** Coffee with a Cop was held at The Coffee Grounds where Officers and K9 Murphy mingled with a lot of community members, including Justin Vernon from Bon Ivor. (see photo)



**Safeguarding the Community:** On Wednesday, August 30th, just before midnight, officers responded to the Beacon House for a report that a male was there agitated and breaking windows. When officers arrived, they encountered a male suspect who immediately fled on foot towards the Chippewa River. Several additional officers arrived to assist and located the suspect on the river bank. The suspect jumped into the river and remained approximately 20 yards from shore, refusing to exit the water. The suspect claimed he was armed with a handgun. He continued to communicate with officers but refused to exit the river for over two hours. The suspect waded his way north, past the Lake Street Bridge, the Grand Ave Foot Bridge, and making his way to the Confluence. The male continued East along the Eau Claire River Bank to the Barstow Street Bridge.

After hours of negotiations, and eventually being cold, the male exited the river and was arrested on multiple charges. There were 12 ECPD officers involved in this case along with the assistance of the Eau Claire Fire Department, Chippewa Falls Police Department, and Eau Claire County Sheriff's Office. This was a highly stressful and drawn out incident resulting in a successful resolution keeping the Eau Claire Community safe.

**Did you Know/Fun Facts:** In one week, the Communications Center processed...

- 2,323 total phone calls, and 729 of them were 911 calls;

- 100% of 911 calls were answered within 20 seconds (National Average 95%).
- 99.7% of calls were answered were answered within 15 seconds (National Average (90%).
- 1,949 Computer Aided Dispatch incidents generated; and
- 10,048 radio transmissions (4,257 minutes).

And in one month, the Record's division...

- Processed 281 open records requests;
- Coded 2,170 cases;
- Submitted 338 case files to the District Attorney's Office; and
- Processed 8,900 videos (body camera, squad camera and interview room cameras) creating a total of over 2,556 hours of video.

## CREDIT OPINION

9 September 2022



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# Eau Claire (City of) WI

## Update to credit analysis

### Summary

[Eau Claire](#) (Aa2) serves as a regional economic hub and benefits from the presence of a university and major health care employers. Ongoing development has supported solid tax base growth and a healthy financial position. These positive attributes are balanced against elevated leverage and limited revenue raising flexibility due to state imposed levy limits.

### Credit strengths

- » Growing tax base which serves as regional economic hub
- » Solid financial position

### Credit challenges

- » Elevated leverage with high fixed-costs
- » Limited revenue-raising flexibility because of state-imposed levy limits

### Rating outlook

Moody's does not typically assign outlooks to local governments with this amount of debt.

### Factors that could lead to an upgrade

- » Further expansion of the tax base coupled with improved resident wealth and income
- » Moderation of total leverage

### Factors that could lead to a downgrade

- » Deterioration of the city's tax base and resident wealth and income
- » Material narrowing of operating reserves



## Key indicators

Exhibit 1

### Eau Claire (City of) WI

	2017	2018	2019	2020	2021
<b>Economy/Tax Base</b>					
Total Full Value (\$000)	\$4,927,011	\$5,245,506	\$5,511,782	\$5,885,066	\$6,241,944
Population	67,945	68,086	68,187	68,720	68,720
Full Value Per Capita	\$72,515	\$77,042	\$80,833	\$85,638	\$90,832
Median Family Income (% of US Median)	95.5%	99.1%	99.7%	103.5%	103.5%
<b>Finances</b>					
Operating Revenue (\$000)	\$72,966	\$76,081	\$76,700	\$80,755	\$80,377
Fund Balance (\$000)	\$31,280	\$33,346	\$26,230	\$28,002	\$28,456
Cash Balance (\$000)	\$34,859	\$36,069	\$48,558	\$39,546	\$38,091
Fund Balance as a % of Revenues	42.9%	43.8%	34.2%	34.7%	35.4%
Cash Balance as a % of Revenues	47.8%	47.4%	63.3%	49.0%	47.4%
<b>Debt/Pensions</b>					
Net Direct Debt (\$000)	\$104,006	\$110,902	\$120,854	\$142,165	\$159,510
3-Year Average of Moody's ANPL (\$000)	\$95,901	\$104,893	\$107,978	\$134,892	\$154,550
Net Direct Debt / Full Value (%)	2.1%	2.1%	2.2%	2.4%	2.6%
Net Direct Debt / Operating Revenues (x)	1.4x	1.5x	1.6x	1.8x	2.0x
Moody's - ANPL (3-yr average) to Full Value (%)	1.9%	2.0%	2.0%	2.3%	2.5%
Moody's - ANPL (3-yr average) to Revenues (x)	1.3x	1.4x	1.4x	1.7x	1.9x

Sources: US Census Bureau, Eau Claire (City of) WI's financial statements and Moody's Investors Service

## Profile

Eau Claire encompasses roughly 34 square miles in [Eau Claire County](#) (Aa1) and [Chippewa County](#) (Aa1), approximately 90 miles east of the [Minneapolis](#) (Aa1 stable)-[St. Paul](#) (Aa1 stable) metropolitan area. It provides a full range of municipal services, including public safety, public works and municipal utilities, to just over 68,000 residents.

## Detailed credit considerations

### Economy and tax base: economic hub with steady development

Eau Claire's role as a regional economic center with significant higher education and healthcare institutions will continue to foster growth. The city's \$6.9 billion tax base is primarily residential (over 60% of full value) with a sizable commercial presence (34%), and has averaged strong 7% annual growth over the past five years. Growth has been largely driven by continued expansion of medical related employers, industrial expansions, and residential development. Single-family home construction will also remain steady given a fair amount of land available for development. There is no taxpayer concentration; the top 10 taxpayers account for only 8% of assessed value.

Eau Claire serves as a regional economic hub, and the presence of both the University of Wisconsin – Eau Claire and [Chippewa Valley Technical College](#) (Aa1) provide a strong talent pool for local employers. The city's largest employers include Menards (10,000 employees), whose headquarters is located within Eau Claire, the [Mayo Clinic](#) (Aa2 stable, 3,396 employees), and the University of Wisconsin-Eau Claire (1,726 employees).

### Financial operations and reserves: solid financial position

Ongoing development within the city will support steady growth in property tax revenue and solid operating reserves. The fiscal 2022 budget includes a \$3.2 million use of general fund balance for capital projects, however, management reports positive variances and currently anticipates a draw of about \$1 million. The city typically budgets use of fund balance and consistently performs better than expected. Eau Claire's allocation of American Rescue Plan Act (ARPA) funding is about \$13 million, which will largely be used for capital projects.

This publication does not announce a credit rating action. For any credit ratings referenced in this publication, please see the issuer/deal page on <https://ratings.moody's.com> for the most updated credit rating action information and rating history.

Eau Claire closed fiscal 2021 with an available operating fund (general, public library, city-county health departments, and debt service funds) balance of \$28 million, or a solid 35% of operating revenue. Not included in the available fund balance is a \$2.1 million receivable due to the general fund from the Hobbs Ice Center enterprise fund, which is scheduled to be fully repaid in 2038 pursuant to a formal repayment schedule. The city's largest source of revenue is property taxes, which comprise about 55% of operating revenue, followed by state aid at 20%.

Like many [Wisconsin](#) (Aa1 stable) municipalities, the city manages and finances development through various tax increment districts (TIDs) that could pose operating pressure if revenue were to fall short of projections. Eau Claire had eight active TIDs at the close of fiscal 2021, two of which had an aggregate \$4.4 million due to other funds to offset deficit fund balances. Receivables from the TID funds are not included in our measure of available operating fund balance. Favorably, seven TIDs are generating incremental revenue; the remaining TID is relatively new and is expected to generate revenue as projects commence.

#### Liquidity

The city closed fiscal 2021 with a net cash position of \$38 million, or a solid 47% of revenue.

#### Debt, pensions and OPEB: elevated fixed costs and leverage

The city's fixed costs and leverage are above average. Eau Claire is in the process of issuing \$34 million of general obligation unlimited tax (GOULT) bonds and notes for capital projects, TID incentives and refunding of prior debt. Following the sale, the city's debt burden will be 2.5% of full value and 2.2x operating revenue. The city does not currently have any concrete plans for additional debt, but typically borrows annually to support its long-term capital plan. Fixed costs, inclusive of debt service and pension contributions, were 25% of operating revenue in fiscal 2021.

#### Legal security

Outstanding GOULT debt is backed by the city's full faith and credit pledge. Debt service is payable from a designated property tax levy that is unlimited as to rate or amount.

#### Debt structure

All of the city's debt is fixed rate. Principal amortization is average with 70% of debt retired within 10 years.

#### Debt-related derivatives

The city has no exposure to any debt-related derivatives.

#### Pensions and OPEB

The strong funding of the city's pension plans is a relative strength. Eau Claire participates in the Wisconsin Retirement System (WRS), a statewide cost-sharing plan. Contributions are determined using a level contribution actuarial method in an effort to keep employer and employee contribution rates at a level percentage of payroll over time, and are set at 100% of the plan's funding requirement. As a result, WRS remains one of the best-funded public employee retirement systems in the country.

The city's three-year adjusted net pension liability (ANPL) is \$155 million, equivalent to 1.9x operating revenue and 2.5% of full value. Moody's ANPL reflects the use of a market-based discount rate to value pension liabilities rather than the assumed rate of investment return on plan assets. In comparison, the reported net pension liability (NPL), based on the plan's reported 7% discount rate, was negative \$19 million in fiscal 2021, reflecting a net pension asset. The city's ANPL is much higher than reported pension liabilities because the market interest rates that we use to value pension liabilities are far lower than reported discount rates.

Eau Claire's other post-employment benefits (OPEB) obligations do not pose a material cost. The OPEB liability reflects an implicit rate subsidy for retirees who pay to remain on the city's health care plan and life insurance benefits to eligible employees via the Local Retiree Life Insurance Fund (LRLIF), a multiple-employer defined benefit OPEB plan. These liabilities are funded on a pay-as-you-go basis, with contributions of \$3.9 million in fiscal 2021. The city's reported net OPEB liability at the close of fiscal 2021 was \$48 million. Moody's adjusted net OPEB liability, which is similar to our adjustments to pension liabilities, is slightly lower at \$47 million, equivalent to 0.8% of full value and 0.6x operating revenue.

#### ESG considerations

Eau Claire, WI's Credit Impact Score is (CIS-2), reflecting moderately negative exposure to environmental risks and neutral-to-low exposure to social and governance risks.

### Environmental

Eau Claire, WI's Environmental Issuer Profile Score is (E-3), reflecting moderately negative exposure to environmental risks. The city has some exposure to flood risk given that it is intersected by the Chippewa River, though officials have effectively managed this risk through the use of levees and comprehensive planning. In recent years, heavy rains and high river elevation have occasionally caused water to rise through the storm sewers, which the city pumps back into the river.

Drinking water is sourced from several groundwater wells. Availability will likely remain strong, though heavy reliance on groundwater can occasionally present risks, such as rising levels of nutrients and other contaminants. The city recently detected certain PFAS chemicals in some of its wells and is currently exploring treatment options. Until a long-term solution is identified, the city is able to restrict pumping from the impacted wells and still generate adequate supply. Management estimates that capital costs could range from about \$9 million to \$22 million depending on the level of treatment required. Officials anticipate that state funding may be available to finance a portion of the project.

### Social

Eau Claire, WI's Social Issuer Profile Score is (S-2) reflecting neutral-to-low exposure to social attributes overall, including healthy demographic and labor trends, solid educational attainment and good health and safety metrics.

### Governance

Eau Claire, WI's Governance Issuer Profile Score is (G-2) reflecting neutral-to-low exposure to governance risks overall. Property taxes, which are the major revenue source for Wisconsin cities, are subject to a cap that restricts increases in the operating levy except to capture amounts from net new construction. Many Wisconsin cities, including Eau Claire, use tax increment districts to attract economic development, often issuing debt to fund initial infrastructure in undeveloped areas. While tax increment districts are ultimately expected to generate revenues sufficient to cover initial city outlay, cities are exposed to economic downturns which could halt development. The city's formal fund balance policy requires the maintenance of a general fund reserves between 15% and 20% of expenditures, a level it currently exceeds. Management maintains a 5-year rolling capital improvement plan and conservative budgetary approach to maintain reserve levels consistent with this policy.

## Rating methodology and scorecard factors

The US Local Government General Obligation Debt methodology includes a scorecard, a tool providing a composite score of a local government's credit profile based on the weighted factors we consider most important, universal and measurable, as well as possible notching factors dependent on individual credit strengths and weaknesses. Its purpose is not to determine the final rating, but rather to provide a standard platform from which to analyze and compare local government credits.

Exhibit 2

### Eau Claire (City of) WI

Scorecard Factors and Subfactors	Measure	Score
<b>Economy/Tax Base (30%)<sup>[1]</sup></b>		
Tax Base Size: Full Value (in 000s)	\$6,928,643	Aa
Full Value Per Capita	\$100,824	Aa
Median Family Income (% of US Median)	103.5%	Aa
<b>Notching Adjustments:<sup>[2]</sup></b>		
Institutional Presence		Up
<b>Finances (30%)</b>		
Fund Balance as a % of Revenues	35.4%	Aaa
5-Year Dollar Change in Fund Balance as % of Revenues	-2.4%	Baa
Cash Balance as a % of Revenues	47.4%	Aaa
5-Year Dollar Change in Cash Balance as % of Revenues	7.1%	A
<b>Management (20%)</b>		
Institutional Framework	A	A
Operating History: 5-Year Average of Operating Revenues / Operating Expenditures (x)	1.0x	Baa
<b>Debt and Pensions (20%)</b>		
Net Direct Debt / Full Value (%)	2.5%	A
Net Direct Debt / Operating Revenues (x)	2.2x	A
3-Year Average of Moody's Adjusted Net Pension Liability / Full Value (%)	2.2%	A
3-Year Average of Moody's Adjusted Net Pension Liability / Operating Revenues (x)	1.9x	A
	Scorecard-Indicated Outcome	Aa3
	Assigned Rating	Aa2

[1] Economy measures are based on data from the most recent year available.

[2] Notching Factors are specifically defined in the US Local Government General Obligation Debt methodology.

[3] Standardized adjustments are outlined in the GO Methodology Scorecard Inputs publication.

Source: US Census Bureau, Eau Claire (City of) WI's financial statements and Moody's Investors Service

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REPORT NUMBER 1341435



CITY OF  
**EAU  
CLAIRE**

***COMMUNITY DEVELOPMENT***

Economic Development: (715) 839-4914

Inspections: (715) 839-4947

Planning: (715) 839-4914

Fax: (715) 839-4939



**CITY OF EAU CLAIRE, WISCONSIN  
CITY OF ALTOONA, WISCONSIN  
EAU CLAIRE COUNTY, WISCONSIN  
REQUEST FOR PROPOSALS**

***Regional Housing Study***

In alignment with our shared housing needs and through the implementation of our respective Comprehensive Plans, the City of Eau Claire, the City of Altoona, and Eau Claire County are jointly seeking proposals to collaboratively conduct a regional housing needs analysis, current and recommended housing inventory, and overall housing policy and structural recommendations—commonly referred to as a Regional Housing Study.

**PUBLISHED: Friday, September 9, 2022**

**All proposals must be submitted by  
12:00 p.m., Friday, September 30, 2022**

**203 S. Farwell St., P.O. Box 5148, Eau Claire, WI 54702-5148  
[www.eauclairewi.gov](http://www.eauclairewi.gov)**

## Introduction

The City of Eau Claire, City of Altoona, and Eau Claire County (“Project Team”) invites proposals for the development of a regional housing study (“Study”), inclusive of a housing needs analysis and housing inventory. The Project Team is approaching the Study from a long-established collaborative approach that most recently culminated in a Chippewa Valley Regional Housing Task Force (“Task Force”). The Task Force established consensus statements and identified key strategies and recommendations. Their final report was released in the summer of 2019 and can be found [here](#), with a summary [here](#). Task Force recommendations were summarized under five categories: Development Regulations; City/County Policies; Public Funding; Public-Private Partnerships; and Civic Strategies. A key recommendation is: “Conduct a community-wide housing survey to address local gaps in data, gain insight into preferences and sentiment.” The purpose of this housing study is to analyze the housing stock and housing market within the community, inventory existing housing resources, identify gaps in the local housing market, identify trends that may affect the housing market over time, and develop strategies to address the current and future needs of the community, with the overall goal of ensuring that housing opportunities are provided for households of all types, ages, and income levels.

## Location

The Study will include the municipalities of Eau Claire and Altoona, as well as Eau Claire County.



1. Eau Claire County Comprehensive Plan 2020

## Proposal Content & Project Expectations

The Project Team respectfully requests a proposal from your firm (“Consultant”) for the provision of the services identified below. The following is not intended to be a comprehensive itemization of tasks or activities needed to complete this housing study, but rather a guide to better explain the Project Team’s intentions. The Project Team will rely on its consultant’s professional expertise to ensure that all pertinent factors are analyzed, and is open to additional or alternative approaches to achieve the overall goal of identifying gaps between the current housing supply and the existing and future housing needs of the community. The project outline and details below represent one potential approach, but the Project Team is open to other ideas and work plans that achieve the intended results. As such, the proposal shall address, but not be limited to, the following:

### Data Expectations

- County-wide Data
  - Utilization of public and non-public data sets (construction, realty, employment, etc.)
  - Assessment records
  - Analysis of existing housing inventory
  - Gap analysis at various types, price/affordability tiers
  - Whole “cost of living” affordability considerations (ALICE report perspective, transportation burden, etc.)
  - Social determinants of health (chronic disease indicators, environmental public health, social vulnerabilities)
  - Cost burden of minority and historically disadvantaged populations, and identification of disparities
  - Trends and barriers in supply and demand, not “just trend line” projections
- High-quality data for individual jurisdictions
  - See categories above

### Housing Market Analysis Expectations

- Demographics
  - County-wide
  - Individual jurisdictions
- Market Analysis
  - County-wide
  - Individual jurisdictions
- Housing Demand
  - County-wide
  - Individual jurisdictions
- Housing Inventory
  - County-wide
  - Individual jurisdictions

### Community Engagement Expectations

At a minimum, Consultant will participate in three public meetings:

1. Initial public overview of the results and findings of the Study analysis at an agreed-upon milestone of the project
2. Final presentation of the comprehensive housing strategy at a public meeting
3. Special joint meeting of the partnering jurisdictions

### Final Report Expectations

- Overall policy & technical measures, in the aggregate and for each individual community, to integrate/align particular community values, principles and objectives through housing facets of: equity; climate/sustainability; fiscal impacts; land use; health; utilities; and transportation.
- Written Report summarizing the above items with narrative, tables, graphics, necessary to explain and summarize the data, and:
  - Provided in a manner that can be utilized at public meetings, at committee meetings, on a project website, on social media, and any other venues that may be included as part of the public process



- Summarizes the public process and lays out a comprehensive housing strategy, with prioritized actions and policies identified, as well as recommendations for the strategic implementation of action steps to be taken
- Includes all collated data, including but not limited to maps and spatial data provided in .shape/.shp files acceptable to the Project Team

Any additional terms or conditions, which are deemed necessary for entering into a contract with the Project Team, should be attached or incorporated as part of the proposal.

## **Project Team Responsibilities**

The Project Team will provide the following services as part of the total project:

1. Access to present and historic housing records (e.g., building files and assessor records) and maps.
2. Existing City and County plans and research will be made available upon request:
  - a. Municipal Codes
  - b. Comprehensive Plans
  - c. Regional Housing Task Force Report and data
3. Upon request, GIS data for the project.
4. Staff will assist in project management and administration. Staff will attend all meetings with the Consultant and assist the Consultant as a liaison between the public and the Consultant, upon Consultant's request.
5. Staff will coordinate and schedule all meetings involving the Consultant. City staff will mail all agendas, meeting minutes and meeting information packets.

## **Evaluation of Proposals**

Selection will be based upon the proposals submitted and will be ranked primarily based upon the following criteria (listed in no particular order):

1. Consultant's understanding of the request and technical approach to the project.
2. Extent of response to each project expectation.
3. Consultant's proposed project schedule.
4. Pertinent experience and qualifications of the Consultant and sub-contractors.
5. Relative value of the services to be provided. (Cost will not be the primary determining factor but will be a specific consideration.)

Proposals should be formatted to clearly and easily allow Project Team scoring of the proposal and should provide supporting documentation for each category noted above. Proposals that do not respond to each category will be deemed non-responsive and will be disqualified.

## Qualifications and Experience of Proposer

1. A statement of the Consultant's understanding that demonstrates knowledge of the project requirements.
2. A description of the Consultant's technical approach to the project, including an outline of the sequence of tasks, major benchmarks and milestone dates.
3. A brief summary, with resumes attached, of key staff on the project team who will be directly involved in the project, including designation of a single point of contact for coordination of the project. Staff resumes should focus on individuals who will have primary responsibility for performance of the work with less emphasis on firm principals.
4. A description of similar project experience involving key staff to be involved in the project. The Consultant agrees to provide references upon request.
5. Proposed use of Project Team staff, office staff, as well as any equipment, materials or additional data that will be expected from the Project Team at the onset of the project.
6. Agreement to accomplish the project within the time frame contained in this RFP.
7. Estimated cost of the services to be provided under this proposal.
8. Proposed services to be subcontracted if any, anticipated subcontractors, and anticipated costs for these services.

## Submission of Proposals

Proposals should be submitted as a PDF via email with the subject line "Regional Housing Study Proposal" no later than **12:00 p.m. Friday, September 30, 2022** to: [Planning@eauclairewi.gov](mailto:Planning@eauclairewi.gov)

## Review Process

The Project Team is not responsible for any costs associated with preparation and submission of proposals to this RFP. The Project Team will consider several factors when making an award. The proposals will be evaluated using the specified expectations, with final decision to be made by the three elected bodies. Staff from the three jurisdictions will review and rank all qualifying proposals. **Staff will make a presentation on the recommended proposal to the Eau Claire City Council, Altoona City Council, and Eau Claire County Board, all at regularly scheduled public meetings anticipated in late October 2022 or early November 2022.**

## Contact Information

Questions regarding this RFP must be submitted **no later than 12:00 p.m. Friday, September 23, 2022**, and may be directed to:

**Scott Allen, Community Development Director**

City of Eau Claire  
203 S. Farwell Street  
Eau Claire, WI 54702-5148  
Phone: (715) 839-4914  
Email: [Planning@eauclairewi.gov](mailto:Planning@eauclairewi.gov)

**Taylor Greenwell, City Planner**

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## Additional Information

The Project Team reserves the right to reject any and all proposals for any reason at its sole discretion, to negotiate the terms and conditions of the eventual contract with the developer awarded the funds, and to impose additional use restrictions, if necessary. City and County records may be checked prior to final approval for delinquencies related to real estate taxes, special assessments, utility bills, or any other payments due to the Cities or County; and for violations of building codes or crimes affecting property or neighborhood stability.

The contents of this packet are for information purposes only and the representations made herein are without warranty. Consultants should rely exclusively on their own investigations and analyses.

*Thank you for your interest in housing in the Chippewa Valley!*