

TO: Mayor Dahlquist and City Council Members
FROM: Christine Howe, Grants Manager
DATE: Meeting Date – November 5, 2026
SUBJECT: Capital Improvement Plan Proposal Acceptance and Contract Approval between Clearwater Financial and City of Pocatello

REQUEST

Staff requests City Council accept the highest rated proposal for the Capital Improvement Plan Request for Proposals (RFP) and authorize the Mayor to execute the professional services agreement between Clearwater Financial, LLC and the City of Pocatello, subject to Legal Department review.

BACKGROUND

In July 2026 the City conducted a Request for Proposals procurement process for qualified firms to develop a Capital Improvement Plan for the City. This project will establish a capital program and plan that will identify: Capital projects and their alignment with priority needs and goals including the Comprehensive Plan; estimated cost of projects; estimated cost of maintenance of projects; timeframe for completion of projects; and the financial plan to adequately fund and resource those projects.

The RFP was advertised beginning July 21, 2026, and proposals were due August 25, 2026. An evaluation committee reviewed the two responsive and responsible proposals received and used the evaluation criteria to identify the highest rated firm. See the enclosed decision summary for additional information on the evaluation and selection process.

Based on the review of the proposals, the contract for the Capital Improvement Plan RFP was recommended to be awarded to Clearwater Financial, LLC the company offering the highest rated proposal. The total contract award for the project is \$204,600.

STAFF RECOMMENDATION

Staff recommends that City Council accept the recommendation of the evaluation committee and award the project to Clearwater Financial, LLC and authorize the Mayor to execute the professional services agreement between Clearwater Financial, LLC and the City of Pocatello for the Capital Improvement Plan, subject to Legal Department review.

RFP Decision Summary

City of Pocatello Capital Improvement Plan 2

The Evaluation Committee for the City of Pocatello's Request for Proposals for Capital Improvement Plan 2 was comprised of: Shane Grow, Chief, Pocatello Fire Department; Tom Kirkman, Director, Pocatello Public Works Department; Aaron Lyon, Chief Information Officer, Pocatello Information Technology Department; and Chantelle Macy, Budget Manager, Pocatello Finance Department.

The Committee reviewed the responsive and responsible proposals that were received by the submission deadline and completed the evaluation matrix for the proposals. The Committee then met to review the evaluation matrices and identified its most highly qualified proposal based on the evaluation criteria.

The recommendation by the Committee based on the review of the proposals and a review of reference information was to award the contract for the Capital Improvement Plan to Clearwater Financial, the company offering the highest rated proposal.

Clearwater Financial was selected due to the fact that their proposal most clearly demonstrated: A thorough and detailed scope of work including a well-articulated methodology and execution of the creation of the CIP within the suggested timeline; extensive previous experience completing comparable projects; a project team with ample qualifications to conduct the work, including capacity, expertise, ability to work with municipalities, and knowledge of the topic; and a reasonable price proposal.

Proposal Due Date: August 25, 2026 at 3:00PM MT

PROPOSALS RECEIVED FROM:	RATING WITHOUT INTERVIEW (Out of 320 each total points)	RATING ON INTERVIEW	OVERALL RATING
Clearwater Financial	300	n/a	300
Stowe Development Strategies	284	n/a	284



MASTER SERVICES AGREEMENT

This professional services and municipal advisory agreement, referred to as the "Agreement" dated _____, is made by and between the City of Pocatello located at 911 N 7th Avenue, Pocatello, ID 83201 referred to as the "Client", AND Clearwater Financial, LLC located at 2300 S Orchard St. Suite E, Boise, ID 83705, referred to as the "Consultant."

1. **Scope of Services.** The Client hereby employs the Consultant to perform the following services in accordance with the terms and conditions set forth in this addendum and any attached exhibits. These services include:

- a. **Capital Improvement Plan Services:** See Exhibit A to this addendum, Request for Proposals – City of Pocatello Capital Improvement Plan (2) and Exhibit B, Consultant response to the RFP.

The completion of this scope will be dependent on the availability of information needed to complete the scope as identified in Exhibit A, some of which may be provided by the Client.

2. **Terms of Agreement.** This Agreement will begin when it is fully executed by both the Client and the Consultant. This Agreement will end two years from the execution date of this Agreement. The time frames for delivery of services will be measured from the execution of this Agreement and as outlined in Exhibit A Either party may cancel and terminate this Agreement on any anniversary date of this Agreement, for any reason, upon 30 days' prior written notice to the other party of such termination.

3. **Costs.** The costs for these services will be:

- a. Project cost \$199,600.
 - b. Travel and incidental cost not-to-exceed \$5,000.

The Consultant will submit a monthly invoice for services performed. The Client will pay the Consultant the amount due as indicated within thirty (30) days of the invoice date.

Travel and reimbursable expenses will be billed separately as identified in the Master Services Agreement.

4. **Conflict of Interest.** Consultant represents that in connection with the issuance of municipal fund securities, consultants receive compensation from its client issuers for services rendered on a per issuance basis and based on size the of the transaction. Consistent with the requirements of MSRB Rule G-42, the consultant hereby discloses that such a form of compensation may present a potential conflict of interest regarding consultant's ability to provide unbiased advice regarding a municipal fund security transaction. This potential conflict of interest will not impair consultant's ability to render unbiased and competent advice or to fulfill its fiduciary duty. Additionally, consultants serve a wide variety of clients that may from time to time have interests that could have a direct or indirect impact on the interests of other consultant clients. The consultant owes a regulatory duty to all clients and mitigates potential conflicts of interest by dealing in the utmost good faith with all clients.

5. **Employment of Others.** The Client and Consultant may from time-to-time arrange for the services of others. All costs to the Consultant for those services will be paid by the Client, but in no event shall the Consultant consult with or employ others for these services without the prior written authorization of the Client. Upon approval by the Client, the Consultant may arrange for the services of others in connection with the delivery of terms of this Agreement. Any such costs will be paid by and are the sole responsibility of the Client.

6. **Other Services.** If other services not mentioned in this Agreement are needed and agreed upon by both the Client and the Consultant, pricing for other services shall be set forth by addendum to this Agreement. Any other additional charges must be mutually agreed to by the Client and the Consultant.

7. **Independent Contractor.** Both the Client and the Consultant agree that the Consultant will act as an independent contractor in the performance of its duties under this contract. Accordingly, the Consultant shall be responsible for payment of all taxes including Federal, State and local taxes arising out of the Consultant's activities in accordance with this contract, including but not limited to, Federal and State income tax, Social Security tax, Unemployment Insurance taxes, and any other taxes or business license fee as required.

8. **Confidential Information.** The Consultant agrees that any information received by the Consultant during any furtherance of the Consultant's obligations in accordance with this contract, which concerns the personal, financial or other affairs of the Client will be treated by the Consultant in full confidence and will not be revealed to any other persons, firms or organizations without the Client's written consent. Pursuant to Idaho Code § 74-101, et seq., information or documents received from the Consultant may be open to public inspection and copying unless exempt from disclosure. The Consultant shall clearly designate each portion as "exempt" on each page of such documents and shall indicate the basis for such exemption. Client will not accept the marking of an entire document as exempt. In addition, Client will not accept a legend or statement on one page that all, or substantially all, of the document is exempt from disclosure. The Consultant shall indemnify and defend Client against all liability, claims, damages, losses, expenses, actions, attorneys' fees, and suits whatsoever for honoring such a designation or for the Consultant's failure to designate individual documents as exempt. The Consultant's failure to designate as exempt any document or portion of a document that is released by Client shall constitute a complete waiver of any and all claims for damages caused by any such release. Any reproduction of any Confidential Information of the Consultant shall remain the property of Consultant and shall contain any and all confidential or proprietary notices or legends which appear on the original. The Client shall not disclose or reveal any Confidential Information to any person other than its representatives who are actively and directly participating in the activities related to the intent of this Agreement or who otherwise need to know the Confidential Information for the purpose of the intent of this Agreement. In addition, prior to any such disclosure, such representatives shall be made aware of the confidential nature of the confidential information and shall be bound by the non-disclosure terms of this Agreement. In any event, the Client shall be responsible for any breach of these terms by any of its representatives. The confidential nature of the provided services and information does not terminate with this Agreement. If sunshine laws require the disclosure of Confidential Information, it is understood by the Consultant that this information will be shared as the law dictates and is necessary.

9. **Non-Competition.** During the term of this Agreement, the Consultant will not engage in business or other activities which are, directly or indirectly, competitive with the activities of the Client. The Client will not engage the municipal advisory services of another party during the term of this Agreement.

10. **Results Not Guaranteed.** The Consultant primary service is to provide added value information and analysis related to the services described above. Much of the information and analysis is based upon historical performance information. While this information may be useful in understanding past performance, past performance is no guarantee of future results. Furthermore, other information and events outside of the services provided by the Consultant may have a significant impact on any results. The Consultant does not guarantee any results and is not responsible for any results, damages, or losses arising from any use of the information it provides.

11. **Governing Law.** This Agreement shall be governed by and construed in accordance with the laws of the State of Idaho. The Parties consent to the exclusive jurisdiction and venue in the courts of Ada County, Idaho.

12. **General.** This Agreement constitutes the entire Agreement of the Parties on the subject hereof and supersedes all prior understandings and instruments on such subject. This Agreement may not be modified other than by amendment in writing executed by the Client and the Consultant.

13. **Sovereign Immunity.** Nothing contained in this Contract shall be considered a waiver of Client's sovereign immunity which immunity is expressly reserved.

14. Representation on Authority of Parties/Signatories. Each person signing this Agreement represents and warrants that he or she is duly authorized and has legal capacity to execute and deliver this Agreement. Each party represents and warrants to the other that the execution and delivery of the Agreement and the performance of such party's obligations hereunder have been duly authorized and that the Agreement is a valid and legal Agreement binding on such party and enforceable in accordance with its terms.

15. Signatures. Both the Client and the Consultant agree to the above Agreement.

Signed by: City of Pocatello
Name: Mark Dahlquist
Title: Mayor

/s/: _____
Date: _____

Signed by: Clearwater Financial, LLC
Name: Cameron Arial
Title: President

/s/: _____
Date: _____

Exhibit A

EXHIBIT A



REQUEST FOR PROPOSALS

For City of Pocatello Capital Improvement Plan

Project Title: City of Pocatello Capital Improvement Plan

Due: August 25, 2026 at 3:00 PM MT

Awarding Authority: The City of Pocatello with a majority vote of the Pocatello City Council.

Contact:

Christine Howe
Grants Manager
911 N. 7th Avenue
Pocatello, ID 83201
chowe@pocatello.gov
208-234-6186

City of Pocatello Capital Improvement Plan (2)
Date Issued: July 21, 2026 after 8:00AM MT

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CITY OF POCATELLO REQUEST FOR PROPOSALS (RFP) FOR CAPITAL IMPROVEMENT PLAN

Section I. Introduction

The City of Pocatello invites interested parties to submit Proposals for the City of Pocatello's Capital Improvement Plan (CIP). In 2021 the City of Pocatello adopted its long-range plan, Comprehensive Plan 2040, to identify the City's priority goals as well as strategies to achieve those goals. The purpose of the CIP is to establish a capital program and plan that will identify: Capital projects and their alignment with priority needs and goals including the Comprehensive Plan; estimated cost of projects; estimated cost of maintenance of projects; timeframe for completion of projects; and the financial plan to adequately fund and resource those projects.

The City of Pocatello is a municipal corporation located in Southeast, Idaho. The City is issuing this RFP and anticipates selecting a firm that has extensive experience working in a local government setting establishing a CIP. Only the firms responding to the RFP will be considered.

This solicitation is being conducted in accordance with the provisions of Idaho Code Title 67, Chapter 28 (Purchasing by Political Subdivisions) and the City of Pocatello Purchasing Policies. Those provisions are hereby incorporated by reference into this RFP. All contracts must be strictly awarded in accordance with the requirements of the RFP. Section 3, disadvantaged business enterprises, minority owned businesses, and women owned businesses are especially encouraged to apply. If it becomes necessary to revise any part of this RFP or otherwise provide additional information, an addendum will be issued to all prospective Respondents who received copies of the original request.

Proposal Due Date: August 25, 2026 at 3:00 PM MT
RFP Availability: <https://pocatello.gov/Bids.aspx> or by emailing: chowe@pocatello.gov

Return RFPs to: City of Pocatello
Attn: Planning and Development Services
911 N. 7th Avenue
Pocatello, ID 83201

Any questions pertaining to the scope of services in this solicitation should be submitted in writing. All answers will be in the form of an addendum and sent to registered Respondents. All questions must be submitted in writing no later than 5:00 PM MT on August 12, 2026 to Christine Howe, Grants Manager, at 208-234-6186, or via email at chowe@pocatello.gov. For help with this process contact Christine Howe at 208-234-6186 or chowe@pocatello.gov.

Please read this entire document before responding or submitting questions. Thank you for your interest.

RFP Issuance	July 21, 2026	After 8:00AM MT
Questions Deadline	August 12, 2026	5:00PM MT
Proposals Due	August 25, 2026	3:00PM MT
Interviews, if necessary	Week of September 7 or September 14, 2026	
Anticipated Selection	Week of September 14, 2026	
Anticipated Contract Start	October 15, 2026	
Preliminary Deliverable	March 31, 2027	
Final Report	September 30, 2027	

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Section II. Instructions & Submission Requirements

A. Instructions

1. Time and Place for Submission

Proposals are to be submitted by mail or in person to Pocatello City Hall, Attn: Planning and Development Services, 911 N. 7th Avenue, Pocatello, ID 83201 by 3:00PM MT on August 25, 2026. Proposals will be considered on time if received by the Submission Deadline using the time on the clock located in the City of Pocatello's Planning and Development Services Department at City Hall. Postmarks will not be considered. E-mail submissions will not be accepted. The City shall not be responsible for proposals arriving late due to couriers, deliveries to wrong locations, express mailing service errors, etc. If, at the time that proposals are due, City Hall is closed due to uncontrolled events, proposals will be accepted until 3:00PM MT on the next day that City Hall is open. No individual extensions of this deadline will be granted. Late proposals will be deemed "non-responsive" and will not be opened. They may be picked up by the Respondent if so desired.

2. Idaho Code

Attention of all Respondents is directed to Title 67, Chapter 28 of the Idaho Statutes governing transactions involving requests for qualifications, and to all other applicable sections of the Idaho Code as most recently amended which govern the award of this contract.

3. Disclosure of Information

Submission of a proposal shall be deemed acknowledgement that the Respondent is familiar with the Idaho Public Records Law, Idaho Code §74, and is bound thereby. Disclosure of any information provided by a Respondent in connection with this RFP shall be in strict accordance with the laws and regulations regarding such disclosure pursuant to Idaho Code §74. To review copies of proposals after contracts have been awarded, submit a written request in compliance with the Idaho Public Record Law using the City of Pocatello Public Records Request Portal, available at: <https://pocatello.gov/251/Records-Requests> or by contacting the RFP contact person identified in this RFP.

4. Reservation of Right

The City of Pocatello may cancel this RFP or may reject in whole or in part any and all responses or proposals when it is determined that said cancellation or rejection serves the best interests of the City. The City reserves the right to reject any or all proposals after determining if each response is responsive and responsible.

5. Non-Collusion

It is understood that the Respondent has submitted the proposal in good faith and has not colluded with any other individuals, firms, or corporations in creating the proposal to subvert the market process. See Certificate of Non-Collusion (Appendix B). Respondents are required to complete this form. Failure to do so will result in a rejection of the proposal.

6. Cost of Proposal

All costs involved in preparing the proposal will be borne by the Respondent. The City or any Department, Division, employee or section of the City will not be liable for any costs associated with the creation of the proposal.

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7. Incomplete or Conditional Proposals

Proposals, which are incomplete, conditional or obscure, may be rejected. No award will be made to any Respondent who cannot satisfy the awarding authority that they have sufficient ability and sufficient capital to enable them to meet the requirements of these specifications. The awarding authority's decision or judgment on these matters shall be final, conclusive, and binding.

B. Submission Requirements

1. One bound, single-sided original hard copy proposal is to be submitted, in a sealed envelope clearly marked with the words: "City of Pocatello Capital Improvement Plan" as well as the Respondent's name. Submission by email is not acceptable.
2. One electronic copy of the proposal should be submitted with the hard copy. Electronic copies should be submitted on properly labeled portable media and MUST mirror paper versions exactly. Electronic copies must be a single PDF file. Submission by email is not acceptable.
3. Failure to submit proposals in the format described herein may result in the rejection of the proposal.
4. The contract is scheduled to be awarded within sixty (60) days of this proposal opening. This RFP as well as the successful Respondent's proposal will become part of the contract.
5. By submitting a signed proposal, the Respondent acknowledges and agrees to the City of Pocatello's "Terms and Conditions" contained in Section III: Terms and Conditions.
6. If any changes are made to this RFP, an addendum will be distributed to all Respondents who have received the RFP.
7. A Respondent may correct, modify, or withdraw a proposal by written notice if received by the City prior to the time and date set for the proposal opening. Proposal modifications must be submitted in a sealed envelope clearly labeled "Modification No. _." Each modification must be numbered in sequence and must reference the original RFP. After the proposal opening, a Respondent may not change any provision of the proposal in a manner prejudicial to the interests of the City or fair competition. Minor informalities will be waived or the Respondent will be allowed to correct them. If a mistake and the intended correct wording are clearly evident on the face of the proposal document, the mistake will be corrected to reflect the intended correct meaning. A Respondent may withdraw a proposal if a mistake is clearly evident on the face of the proposal document, but the intended correct wording is not similarly evident.
8. Individuals are encouraged to submit proposals; individuals who submit proposals will not be subject to requirements that are only applicable to businesses such as authorized signatory and financial stability certifications. However, individuals will still be required to fill out those applicable portions of the required forms.
9. Proposals must also include the: Price Proposal Form, Certificate of Non-Collusion, and Certificate of Tax Compliance as provided in this RFP. See Appendices for additional details.
10. All proposals must be signed by appropriate, authorized individual or individuals, e.g. if the Respondent is a partnership, by the name of the partnership, with the signature of each general partner. If the Respondent is a corporation, it must be signed by the authorized officer whose

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signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed, or appropriate certificate of authorization.

11. All questions and requests for clarification must be received in writing by 5:00PM MT on August 12, 2026.
12. Written addenda issued by the City will be e-mailed as necessary to all parties that the City is aware have requested documents using the contact information provided to the City. A copy of any addendum as may be issued will be on file with the City. Absence of "failure" messages electronically transmitted from addressee's site will serve as confirmation of delivery of addenda. Respondent should contact Christine Howe via e-mail or phone, if they believe an addendum has not been received. A copy of all addenda that are issued should be included in the proposal package and each addendum should be initialed in the bottom left corner of the first page of the document by the Respondent.
13. The City of Pocatello is the awarding entity that will sign the contract and to whom invoices will be submitted/received and by whom the Respondent will be paid/submit payment.
14. All proposals will be reviewed by the Evaluation Committee. A recommendation will be made by the Evaluation Committee to accept the proposal which is in the best interest of the City. The Evaluation Committee will, in turn, recommend to the full City Council for a vote to appropriate funding and award. The consideration of all proposals and subsequent selection of a successful Respondent shall be made without regard to race, color, sex, age, handicap, religion, political affiliation, or national origin. The recommendation will be based on the evaluation criteria (Section V).
15. Failure to complete the enclosed forms, answer any questions, or provide the required documentation will result in the proposal being deemed non-responsive and the rejection of the proposal, unless the City determines that such failure constitutes a minor informality.

Section III. Terms & Conditions

A. General Terms and Conditions

1. The process of selecting organizations to provide consultation services for the City's benefit requires the accumulation of comprehensive and accurate information to ensure that a knowledgeable, objective decision can be made as well as compliance with state and local procurement standards for the implementation portion of this proposal.
2. The City reserves the right to accept or reject all proposals or portions thereof without stated cause. The City reserves the right to re-issue any RFP or cancel the RFP if none of the proposals are deemed satisfactory to the City. Upon selection of a finalist, the City by its proper officials shall attempt to negotiate and reach a final agreement with the finalist. If the City, for any reason, is unable to reach a final agreement with this finalist the City then reserves the right to reject such finalist and negotiate a final agreement with another finalist who has the next most viable proposal. The City may also elect to reject all proposals and re-issue a new RFP.
3. Clarification of proposals: The City reserves the right to obtain clarification of any point in a Respondent's proposal or obtain additional information. Any request for clarification or other correspondence related to the RFP shall be in writing or email, and a response shall be provided within two business days. The City is not bound to accept the proposal with the lowest cost, but may accept the proposal that demonstrates the best ability to meet the needs of the City. The City reserves the right to waive any formalities, defects, or irregularities, in any proposal, response, and/or submittal where the acceptance, rejection, or waiving of such is in the best interests of the City. The City reserves the right to disqualify any proposal, before or after opening, upon evidence of collusion, intent to defraud, or any other illegal practice on the part of the Respondent.
4. Conflict of Interest: By the submission of a proposal, the Respondent agrees to ensure that, at the time of contracting, the Respondent will have no interest, direct or indirect, that would conflict in any manner or degree with the performance of the Respondent's obligations under the Agreement. The Respondent shall further covenant that, in the performance of the Agreement, the Respondent shall not employ any person, or subcontract with any entity, having any such known interest.
5. Public Information: Information supplied by the Respondent to the City may be subject to the Idaho Public Records Law. Such information shall become public unless it falls within one of the exceptions in the statute, such as security information, trade secret information, or labor relations information. If the Respondent believes any information which is not public will be supplied in response to this RFP, the Respondent shall take reasonable steps to identify for the City what data, if any, it believes falls within the exceptions. If the proposal data is not marked in such a way as to identify non-public data, the City will treat the information as public and release it upon request. In addition, the City reserves the right to make the final determination of whether data identified by the Respondent as not public falls within the exceptions within the statute.
6. Equal Employment Opportunity: The Respondent agrees to comply with all federal, state, and local laws, resolutions, ordinances, rules, regulations, and executive orders pertaining to unlawful discrimination on account of race, color, creed, religion, national origin, sex, marital status, status with regard to public assistance, sexual preference, disability, or age. When required by law or requested by the City, the Respondent shall furnish a written affirmative action plan.

Section IV. Project Overview and Scope of Work

A. Project Overview

1. The purpose of the CIP is to identify: capital projects and their alignment with priority needs and goals including the Comprehensive Plan; estimated cost of projects; estimated cost of maintenance of projects; timeframe for completion of projects; the financial plan to adequately fund and resource those projects.

B. Scope of Work

1. The awarded firm will work with the City to create a single capital improvement plan (CIP) document that will include a capital program/policy as well as capital budget. The CIP will include a capital policy, project descriptions, cost estimates, project schedules and priorities, and funding sources. Annually, after adoption of plan and moving forward, the City should be able to use the CIP to:
 - a. Present the Capital Program and Capital Budget to city officials for adoption
 - b. Monitor approved projects
 - c. Update the Capital Program and Capital Budget annually as needed

2. The CIP shall be composed of a Capital Program and a Capital Budget as detailed below.

- a. Capital Program

The Capital Program serves as the community planning and fiscal management tool that spans five to ten years. The capital program identifies and defines capital items, which are typically tangible assets or projects that cost more than a certain threshold (e.g., \$50,000) and that have a minimal useful life span (such as five years), provides a planning schedule, and offers financing options. This serves as the policy portion of the CIP to inform what is contained in the capital budget.

The awarded firm will complete the following sections of the capital program:

1. Overview of purpose of CIP and what it strives to achieve (i.e. – alignment with Comprehensive Plan and long-term financial outlook)
2. Draft ordinance or resolution for adoption by City Council
3. CIP budget calendar
4. CIP Financial Policies including: CIP budget policy (to guide annual budgeting); CIP debt policy to guide investment, bonding, etc.
5. The awarded firm shall work with the City's investment firm to inform the Capital Program and related policies. This may include informing long-term capitalization of projects, thresholds for debt service obligations, reasonable investment income that can be anticipated, revenue projections for long term project financing, etc.

- b. Capital Budget

The awarded firm will meet with City staff and appropriate committees to identify infrastructure and building improvement needs and priorities; incorporate existing plans, rate studies and other planning documents into a priority plan; and compile a detailed 5-year CIP with descriptions, cost estimates, maintenance costs, and funding sources.

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To complete the capital budget the awarded firm will:

1. Prepare an inventory of existing capital assets
2. Determine the status of previously approved projects
3. Assess the City's financial capacity
4. Solicit, Compile, and Evaluate Capital Project Requests from Citywide Departments
5. Identify future projects per the City's existing plans and adopted goals (i.e. – Comprehensive Plan Strategies). This should include cost tier, timeframe for completion, and resource needs
6. Establish Project Priority. This should include the project prioritization using the metrics identified in the Capital Program and items 2 and 3

The Capital budget should provide a Matrix of Projects that details (at a minimum): priority level, timeframe for completion, cost estimates including maintenance and/or future operating costs, and funding sources.

The capital budget shall also include funding projections and an identification of revenue sources. To complete this portion of the budget the firm will:

1. Develop a CIP Financing Plan that includes (at a minimum) fiscal year outlooks, municipal debt and funding sources, local funding strategies, state and federal funding sources.
2. The awarded firm will work with the city's investment strategy firm to help determine reasonable revenue or funding sources for the prioritization of projects in the capital plan

c. Deferred Maintenance Cost Projection:

In order to inform capital priorities and available funding, the awarded consultant will evaluate the City's deferred maintenance for its existing facilities and assets. This includes, but is not limited to, parks and recreation, public works, municipal properties, and public safety facilities. The deferred maintenance cost projection should inform the 5-year annual budget projections and available funding for the CIP projects.

3. Deliverables:

a. Preliminary Deliverables:

1. Initial draft CIP Policies
2. Project List with at least top 5 projects for FY26 identified
3. Preliminary Cost projections for priority FY26 projects
4. General cost estimates for Capital Needs
5. Presentation of initial findings to City Council for FY26 budget discussions

b. Final Report Deliverables:

The following are anticipated deliverables that will be provided by the awarded firm:

1. Stakeholder interviews including relevant City Staff, Officials, Committees, etc.
2. Facilities inventory with cost estimates and schedule
3. Equipment Inventory and cost estimates and schedule
4. Roadway inventory and cost estimates and schedule
5. Incorporation of existing rate studies into the CIP
6. Prioritization meeting with relevant stakeholders

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7. Capital Improvement Plan Document
 8. Presentation of CIP at Public meeting
 9. Final Capital Improvement Plan in both hardcopy and digital format
4. Timeframe for Completion:
The proposed project should start by approximately October 15, 2026 and a preliminary report should be completed by March 31, 2027 to assist in the FY27 budget development. The final report should be scheduled to be completed by September 30, 2027.

Section V. Selection Process and Evaluation Criteria

A. Selection Process

1. Only those Respondents who submit all forms and materials as required and meet the Minimum Criteria will be considered responsive.
2. Interviews will be optional and the City reserves the right to conduct interviews or not based on the proposals received.
3. The City has determined that the selection of the most advantageous offer for these services requires comparative judgement of factors (evaluation criteria). The proposals will be evaluated on a points basis with the highest score being deemed the most advantageous.
4. The contract award shall be made to the responsible firm whose proposal is determined most advantageous, considering all factors specified in the RFP.

B. Minimum Criteria

1. Proposal shall be a maximum of 15 pages, counting cover letter but NOT COUNTING personnel resumes, dividers, binding cover(s), or required forms. No font may be smaller than 11 point for body text or smaller than 9 point for other text. Page numbers are given for 8.5"x11" sheets. Pages in excess of the 15 page limit will not be reviewed. The proposal shall address the following components (number of pages listed here are suggested):
 1. Cover Letter (1 page)
 2. Scope of Work (4 pages) - Describe how the firm proposes to execute the tasks within the scope of work (and any recommended adjustments to the scope or individual tasks). Describe particular challenges and the approach for addressing these challenges.
 3. Proposed Schedule (2 pages) - The proposed schedule should include completion of work tasks and deliverables as well as any key meetings.
 4. Project Budget (2 pages) - The proposed budget should include a price breakdown by scope of work deliverable and cost and rates for the personnel such that cost reasonableness can be determined.
 5. Previous Experience (3 pages) – Describe similarly completed work and completion of CIPs for other communities and entities.
 6. Qualifications of Team (3 pages + resumes) - Describe Team's experience in areas needed to fulfill the project scope and any related project experience that illustrates the firm's ability to carry out this project. Describe the makeup of the project team, and the project team's experience working on and completing similar work in the last 5 years.
 7. References - Please provide a minimum of three, including the name, email, and telephone number of the contact person.

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C. Proposal Evaluation Criteria

1. Each responsive proposal will be evaluated using the following criteria:

Criteria	Points
Scope of Work including methodology and execution of CIP and within the timeline	20
Previous Experience completing comparable projects	25
Team Qualifications including capacity, expertise, ability to work with municipalities, and knowledge of the topic	25
Price Proposal	10
Interview (Optional)	20

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Date Issued: July 21, 2026 after 8:00AM MT

Section VI. Contract Award

1. The City of Pocatello intends to evaluate proposals and award a firm without discussions with Respondents (except for clarification purposes). The City reserves the right to reject any and all offers for any reason whatsoever in the City's sole discretion; to waive immaterial project requirements; and to pursue purchasing in a manner that is in the best interests of the City.
2. The Respondent deemed to be the most advantageous to provide the services required for the proposed project will be notified in writing through a notice of award. Once an agreement is reached with a preferred Respondent, the City will provide a service agreement for signature and full execution. A Notice to Proceed will be issued to formally begin work.
3. If after negotiation and consideration, the City is unable to reach an acceptable agreement with the Respondent, the City will terminate negotiations with the Respondent and, at its sole discretion, may enter into negotiations with the second most highly advantageous Respondent and/or withhold the award for any reason and/or elect not to proceed with any of the proponents and/or re-solicit via a new RFP.

City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix A. Price Proposal

Price Proposal Form - City of Pocatello Capital Improvement Plan RFP

The undersigned proposes to provide services to the City of Pocatello in accordance with the response to its Request for Proposals (RFP). This price includes all services and out of pocket expenses as per the terms and specifications stated in the non-price proposal. Price includes but is not limited to all deliverables listed in the RFP.

\$ _____

All-inclusive fees

_____ Dollars

Written sum

On a separate page or pages, please provide details of proposed deliverables and schedule of associated payments. Please also provide a detailed breakdown of the labor rates and estimated labor hours for each staff member in the proposal.

Signature (blue ink please)

Printed Name

Title

Date

Company Name

Email

Street

Phone

City, State, Zip

Fax

City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix B. Non-Collusion Affidavit

NON-COLLUSION AFFIDAVIT

THIS FORM IS TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL.

STATE OF _____)

:SS

COUNTY OF _____)

_____, being first duly sworn, deposes and says that he or she is _____ of _____, the (sole owner, partner, president, secretary, etc.) party making the foregoing proposal, that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company association, organization, or corporation; that the bid is genuine and not collusive or sham; that the Respondent has not directly or indirectly induced or solicited any other respondent to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any respondent or anyone else to put in a sham proposal, or that anyone shall refrain from responding; that the Respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Respondent or any other respondent, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other respondent, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the Proposal are true; and further, that the Respondent has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal.

Signed: _____

Title: _____

Subscribed and sworn to before me

This _____ day of _____, 20____ (SEAL)

Notary Public in and for the

County of _____

State of _____

Residing at _____

My Commission expires _____

City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix C: Affidavit of Payment or Securement of All Taxes

**AFFIDAVIT OF PAYMENT OR SECUREMENT OF ALL TAXES
THIS FORM IS TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL.**

STATE OF _____)

:SS

COUNTY OF _____)

_____, being first duly sworn, deposes and
says that _____
(Bidder)

he or she _____ in conformance with Idaho Code 63-15-2;
affiant _____ (is/is not)

states that _____ has paid or secured to the satisfaction
of the _____ (Bidder)

respective taxing units all taxes for which he or his property is liable now due or delinquent
including assessments, excises, and license fees levied by the State of Idaho or any taxing
unit within the State of Idaho or the taxing unit of the applicable state within which the Respondent's
business is located.

Dated this _____ day of _____, 20_____.

Signed: _____

Title: _____

Subscribed and sworn to before me

This _____ day of _____, 20_____ (SEAL)

Notary Public in and for the

County of _____

State of _____

Residing at _____

My Commission expires _____

Request for Proposals – City of Pocatello Capital Improvement Plan 2

Date of Addendum: August 7, 2026

RFP Due Date & Time: August 25, 2026, at 3:00 PM M.T.

Addendum # 1:

Question 1: Could you please enlighten me on what the Capital Improvement Plan consist of? Is it city planning, or building planning?

Answer to Question 1: A Capital Improvement Plan is a multi-year financial plan that identifies major physical infrastructure projects so that they can be planned of r and budgeted accordingly. The CIP is typically composed of a capital program with a guiding policy as well as the plan, which is a 3–5 year plan for the anticipated projects and their priority for completion. Please refer to the RFP for more information on the CIP deliverables.

Question 2: Is there a ballpark amount that the city has budgeted for this project to develop the CIP?

Answer to Question 2: The City anticipates a budget of \$150,000-\$200,000 for this project.

Question 3: Beyond facilities, equipment, and roadway inventories, are you also looking for CIP projects that would include condition assessments as well?

Answer to Question 3: Yes, the Plan should incorporate all projects that would be defined as major infrastructure projects that achieve or are included in City plans, goals, or priorities that would need long-term funding.

Question 4: Public Safety facilities are mentioned. Do these include police, fire facilities?

Answer to Questions 4: Yes.

Question 5: Who at the city will manage this project?

Answer to Question 5: The project will be managed by City Planning and Finance Department staff.

Question 6: I understand this project leans a little more towards the planning side of things and less towards engineering, so I understand potentially including price in scoring. However, there will be a decent amount of effort that involves estimating. I think this will be difficult to put a price together for estimating. We don't know how many different projects will need to be estimated. We could say ## hours per Transportation, Public Safety facilities will require ## Hours. There is so much variability between projects and an unknown number of them, makes developing a price for estimating difficult. Can estimating projects be excluded from pricing?

Answer to Question 6: Contractors should provide sufficient budget to complete the work required for estimating capital project costs for the CIP. For budgeting purposes for this proposal submission, Contractors can assume a range for departments that is a minimum of at least 5 projects per department and a maximum of 15 projects. Consultants should use their best judgement in determining the range required per department. As noted in the RFP, existing rate studies for enterprise account-funded departments will be incorporated but not require estimating. In the event more project estimating is required during the term of the contract (ie – a Department exceeds the 15-project maximum), this can be negotiated and included as a change order request with the awarded contractor.

Request for Proposals – City of Pocatello Capital Improvement Plan 2

Date of Addendum: August 19, 2026

RFP Due Date & Time: August 25, 2026, at 3:00 PM M.T.

Addendum # 2:

Question 1: Appendices B (Non-Collusion Affidavit) and C (Affidavit of Payment or Securement of All Taxes) are formatted as affidavits with notary acknowledgment blocks, and each states it is to be executed by the Respondent and submitted with the proposal. Please confirm whether these affidavits must be notarized at the time of proposal submittal, or whether notarization may be provided by the successful Respondent prior to contract execution.

Answer to Question 1: Yes, the appendices must be notarized to be considered completed forms with the submission. Unnotarized documents included in the RFP will be considered non-responsive. Acceptable forms of notary include wet ink or verified digital notary signatures.

Question 2: Is there a ballpark amount that the city has budgeted for this project to develop the CIP?

Answer to Question 2: The City anticipates a budget of \$150,000-\$200,000 for this project.

Question 3: Beyond facilities, equipment, and roadway inventories, are you also looking for CIP projects that would include condition assessments as well?

Answer to Question 3: Yes, the Plan should incorporate all projects that would be defined as major infrastructure projects that achieve or are included in City plans, goals, or priorities that would need long-term funding.

Question 4: Public Safety facilities are mentioned. Do these include police, fire facilities?

Answer to Questions 4: Yes.

Question 5: Who at the city will manage this project?

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Question 6: I understand this project leans a little more towards the planning side of things and less towards engineering, so I understand potentially including price in scoring. However, there will be a decent amount of effort that involves estimating. I think this will be difficult to put a price together for estimating. We don't know how many different projects will need to be estimated. We could say ## hours per Transportation, Public Safety facilities will require ## Hours. There is so much variability between projects and an unknown number of them, makes developing a price for estimating difficult. Can estimating projects be excluded from pricing?

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Exhibit B

EXHIBIT B

City of Pocatello Capital Improvement Plan RFP Proposal



CLEARWATER
— FINANCIAL —

Kimley»»Horn



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I

Cover Letter



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CAPITAL IMPROVEMENT PLAN RFP RESPONSE



Cover Letter

Dear Selection Committee,

The consultant team (Team) of Clearwater Financial (CWF) and Kimley-Horn (KH) is pleased to submit this proposal to prepare the City of Pocatello Capital Improvement Plan (CIP or Plan). The Team combines municipal finance, implementation planning, capital budgeting, stakeholder engagement, transportation, infrastructure, utility, and GIS expertise to deliver a CIP that is financially feasible, technically sound, reflective of the City's needs, and ready for implementation.

Clearwater Financial is the prime consultant and Cameron Arial will be the Team lead in charge of project management, financial policy development, capital budget coordination, stakeholder engagement, financial strategy, implementation planning, and final report assembly. Kimley-Horn is the technical engineer subconsultant, and Maureen Gresham will lead asset inventory and assessment, deferred maintenance cost projections, and capital project prioritization.

Together, the Team will:

- Evaluate the City's current financial capacity and develop capital budget, debt, and financing policies aligned with the Comprehensive Plan and long-term capital needs.
- Engage City departments, officials, committees, and other stakeholders to identify capital needs, review existing plans and rate studies, and compile project requests.
- Develop an inventory of City facilities, equipment, roadways, and other capital assets, including an assessment of deferred maintenance needs, costs, and schedules.
- Establish a transparent project evaluation and prioritization process and prepare a five-year capital budget identifying project costs, schedules, maintenance, and funding.
- Prepare and present the preliminary and final CIP, including policies, prioritized projects, financing strategies, public and City Council presentations, and tools for annual updates.

Our Team is committed to providing the City with a clear and action-oriented CIP that gives the City direction on capital priorities, financial policies, and funding strategy and, most importantly, is implementable. Thank you for your consideration. We welcome the opportunity to discuss our qualifications and approach.

Sincerely,

Cameron Arial, Ph.D., MAP

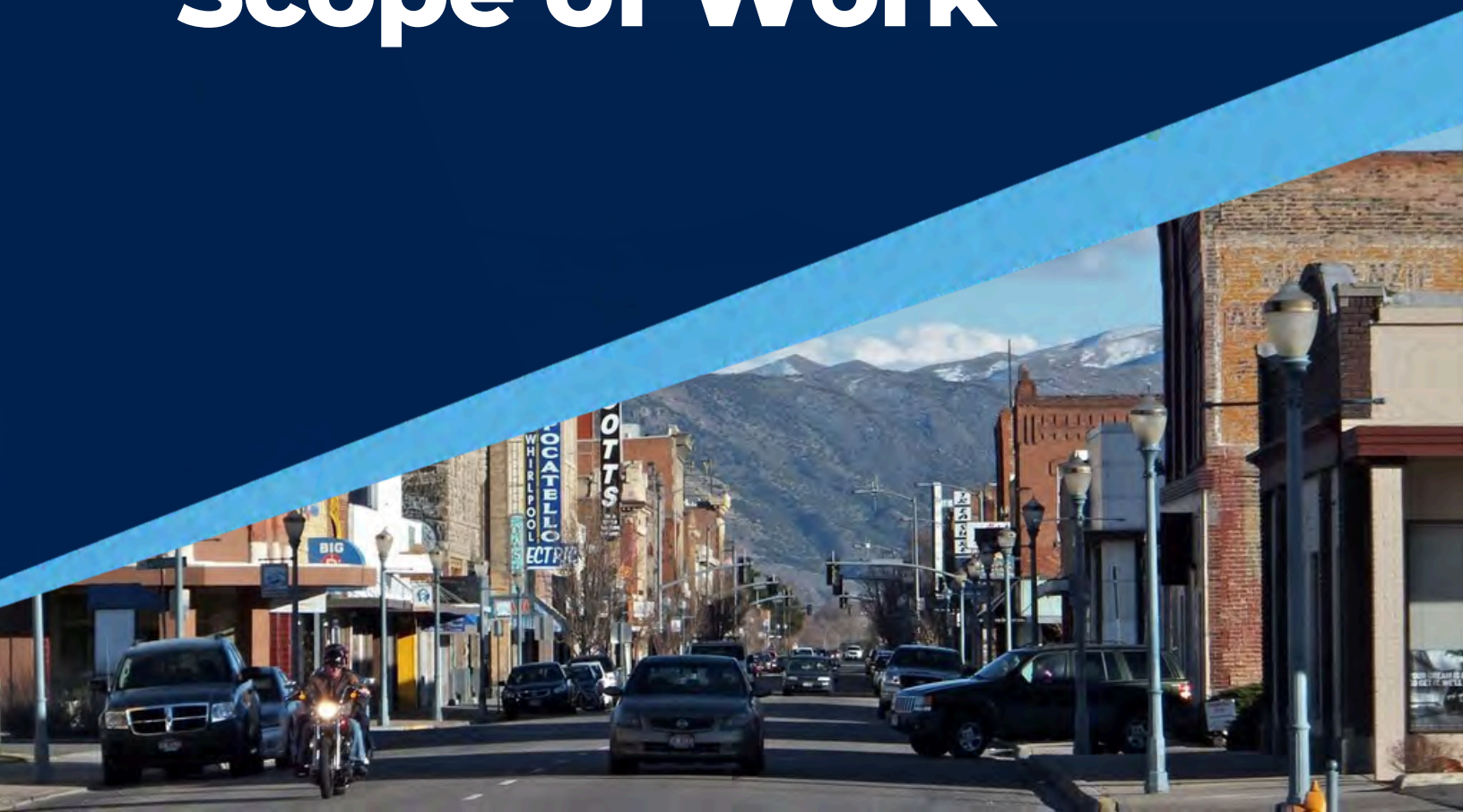
President & CEO

📞 208.559.4353

✉ carial@clearwaterfinancial.biz



Scope of Work



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CAPITAL IMPROVEMENT PLAN RFP RESPONSE



Scope of Work

Overview

Clearwater Financial and Kimley-Horn will work as an integrated Team to develop a unified CIP document containing both the Capital Program and Capital Budget. The CIP will connect the City's long-range community priorities, Comprehensive Plan, financial capacity, and existing planning documents to a practical framework for capital investment, implementation, and annual budgeting.

The Capital Program will establish the policy and financial framework for a five- to ten-year planning horizon, including capital project definitions and thresholds, project prioritization criteria, the CIP budget calendar, financial and debt policies, financing considerations, and a draft ordinance or resolution for City Council adoption. The five-year Capital Budget will apply this framework to specific projects by identifying project priorities, anticipated timing, cost tiers and estimates, resource needs, maintenance and future operating impacts, and potential funding sources.

The Project Approach will address the following challenges faced by the City of Pocatello:

- Incomplete or inconsistent asset-condition information across departments
- Different levels of project development and cost certainty
- Integrating projects from numerous City departments into one consistent prioritization framework
- Reconciling long-range infrastructure needs with actual five-year financial capacity and annual budget constraints
- Integrating existing enterprise-fund rate studies without duplicating work

The resulting CIP will provide the City with an annually repeatable framework for presenting the Capital Program and Budget for adoption, monitoring approved projects, and updating project priorities, costs, schedules, funding assumptions, and financial projections.

Project Management

A successful CIP requires disciplined project management, clear decision-making, and close coordination between financial, technical, and policy work. CWF will serve as the City of Pocatello's primary point of contact and project manager, providing a single point of accountability throughout development of the CIP. Major findings and deliverables will be reviewed jointly to ensure that technical needs, project priorities, financial capacity, and implementation strategies remain fully coordinated.

CWF will begin with a collaborative kickoff meeting to confirm City priorities, desired outcomes, roles, responsibilities, schedule, communication protocols, and key decision points. Following kickoff, CWF will establish a detailed Project Management Plan that defines the project schedule, data needs, meeting cadence, milestone reviews, quality-control procedures, document review responsibilities, and processes for identifying and resolving scope, schedule, or coordination issues.



Scope of Work

Regular project meetings will integrate progress reporting, technical coordination, financial review, and upcoming decisions rather than treating project management as a separate administrative exercise. CWF will maintain the project schedule, track deliverables and outstanding information, coordinate consultant activities, and facilitate timely communication with City staff and committees.

Defined milestone reviews will occur as the Team advances through existing conditions and asset findings, financial capacity analysis, project identification and prioritization, development of the Capital Program and five-year Capital Budget, financing strategy, draft CIP, and final adoption materials. This structured approach will minimize rework, maintain consistency across all CIP components, and provide the City with a coordinated, implementable final Plan.

Capital Program Approach

The Team will develop the City of Pocatello's Capital Program as a practical policy and financial framework that connects long-range community priorities to annual capital budgeting and implementation. CWF will conduct up to 10 focused interviews and up to 2 working sessions with key City staff and stakeholders to understand existing capital practices, departmental priorities, financial constraints, and the relationship between proposed investments and the Comprehensive Plan.

The Team will develop a planning-level asset inventory and deferred maintenance assessment for applicable City asset categories, including facilities and municipal properties, equipment, roadways, parks, public works, public safety facilities, and other capital assets. The inventory will be based on City-provided data, adopted plans/prior studies, GIS information, maintenance records, department input, and targeted technical review. The inventory will document each applicable asset or project description, responsible department or City function, known deficiency or need, available condition information, project status, anticipated improvement or replacement timing, data source, and data gaps. Project status may include whether an item is previously approved, active, planned, unfunded, or needing future study. This approach will keep the CIP moving forward while documenting the source, reliability, and limitations of available information.

The Team will use a tiered technical review process to focus effort where it adds the most value. Higher-cost, mission-critical, near-term, or higher-risk assets will receive more focused review, while lower-definition needs will remain visible in the CIP as placeholders or future-study items. Planning-level condition screening will use the categories of Good, Fair, Poor, Critical, and Unknown/Data Gap, with the basis for each rating documented. These ratings, along with available age, maintenance history, and remaining useful life considerations, are intended to support the CIP prioritization, scheduling, and funding decisions.

All qualifying major infrastructure projects will be included in the CIP. Applicable Assets will receive planning-level condition review using existing data and City input. The depth of the technical review will vary based on cost, risk, condition, readiness, and available information.



Scope of Work

Where records are incomplete, conflicting, or unavailable, the Team will document the item as a data gap or future-study need. Field verification will be exception-based, using targeted visual review where existing records or staff input cannot reasonably resolve a material condition, cost, timing, or readiness assumption. Field review will include up to 20 targeted sites. The resulting inventory will be structured as a reusable, updateable technical inventory so the City can refresh asset, condition, timing, data gap, and deferred maintenance information during future annual CIP updates.

The resulting Capital Program will serve as the policy framework for the CIP, establishing a consistent and repeatable process for how projects are identified, defined, prioritized, scheduled, and funded. CWF will prepare the required statement of purpose and policy direction; define capital project criteria, including appropriate cost and useful life thresholds; develop a CIP budget calendar; and draft financial policies addressing annual capital budgeting, debt issuance and debt capacity, investment considerations, and long-term capitalization. As a registered municipal advisor representing the City's interests as a fiduciary, CWF is uniquely qualified to coordinate with the City's investment firm to verify that investment income, debt service capacity, revenue availability, and financing structure are aligned with the City's broader financial strategy.

Finally, CWF will translate the analysis into an implementable policy package, including a recommended Capital Program, preferred funding and financing approaches, and a draft ordinance or resolution for City Council adoption. The Team will facilitate review with City leadership and decision-makers, refine the program based on feedback, and establish an annual rolling-update process so the CIP remains responsive to completed projects, changing priorities, updated financial forecasts, and emerging capital needs.

Capital Program Deliverables:

- CIP Policies
- Stakeholder Interviews and Prioritization Meeting
- Facilities Inventory with Cost Estimates and Schedule
- Citywide Project Request Process
- Equipment Inventory with Cost Estimates and Schedule
- Roadway Inventory with Cost Estimates and Schedule
- Preliminary Report (by 03/31/2027)

Capital Budget

CWF will develop the City of Pocatello's Capital Budget as the implementation component of the broader Capital Improvement Plan. While the Capital Program will establish the policies, criteria, and decision-making framework governing capital investment, the Capital Budget will apply that framework to specific projects and funding decisions over a five-year planning horizon. This integrated approach will provide the City with a transparent, financially sustainable, and repeatable process for moving projects from identified need to implementation.



Scope of Work

CWF will establish a standardized process for soliciting and evaluating capital project requests from departments citywide. Each project will be documented consistently, including its purpose, relationship to adopted City goals, anticipated timeframe, estimated capital cost, ongoing maintenance and operating impacts, resource requirements, and potential funding sources. Projects will then be evaluated using the prioritization criteria established through the Capital Program, together with the condition and status of existing assets, previously authorized commitments, financial capacity, regulatory or operational requirements, and alignment with community priorities.

The Team will develop planning-level cost estimates, cost ranges, or cost bands for applicable projects and assets identified through the Task 5 inventory and other City-provided capital project information. For projects with defined scopes, recent estimates, adopted plan costs, or comparable unit-cost information, the Team will prepare planning-level cost ranges. For recurring or lower-definition asset types, the Team may use standard cost bands or assumption ranges rather than preparing custom estimates for each individual item. This approach provides consistent budget data while avoiding unsupported precision during the first CIP cycle.

Maintenance and future operating cost notes will be included from City records, prior studies, department input, or reasonable planning assumptions; the scope does not include full lifecycle cost modeling or detailed operations analysis. Schedule and phasing inputs will be limited to technical timing assumptions, such as near-term, mid-term, long-term, or future-study timing, and will not replace the CIP financing plan.

Consistent with Addendum 1, the Team's approach assumes approximately 5 to 15 projects per applicable department for project-level estimating. Projects already addressed through existing rate studies for enterprise-funded departments will be incorporated into the CIP without duplicating existing cost-estimating work. If a department ultimately requires estimates for more than 15 projects, the Team will coordinate with the City regarding additional scope in accordance with Addendum 1.

The Team will identify potential bundling and sequencing opportunities where related roadway, utility, facility, parks, public works, public safety, or equipment investments may be coordinated to reduce disruption, avoid rework, or improve delivery efficiency. The Team will also provide technical inputs to support prioritization, including condition or need screen, cost confidence, readiness considerations, sequencing considerations, dependencies, and data gaps.

A central component of the process will be assessing the City's ability to implement the identified capital program. CWF will analyze historical financial performance, available fund balances, projected revenues, existing and anticipated debt obligations, and other financial commitments to establish realistic capital funding capacity. Project costs and anticipated operating impacts will be incorporated into the financial analysis so that the five-year CIP reflects both the initial investment and its longer-term budget implications.



Scope of Work

The resulting Capital Budget will include a clear matrix of projects identifying project priority, anticipated implementation timeframe, estimated capital costs, projected maintenance and future facility operating costs, and proposed funding sources. This matrix will provide City leadership and Council with a concise tool for evaluating competing priorities and understanding the financial consequences of capital decisions.

CWF will prepare a five-year CIP Financing Plan identifying municipal debt, local funding strategies, available revenues, and potential state and federal funding sources. In coordination with the City's investment strategy firm, CWF will evaluate reasonable revenue assumptions and financing capacity to match prioritized projects with sustainable funding strategies. The result will be a Capital Budget that directly implements the policies established in the Capital Program and can be updated annually as projects, priorities, costs, and financial conditions change.

Capital Budget Deliverables:

- FY 2027 project list with top five projects identified*
- FY 2027 preliminary cost projections for priority projects*
- Presentation of initial findings to City Council (March 2027)
- General cost estimates for capital needs
- Incorporation of existing rate studies into the CIP
- Capital Improvement Plan document (both hardcopy and digital format)
- Public presentation of final Capital Improvement Plan (September 2027)

**The RFP references FY26. Based on the anticipated October 2026 notice to proceed and the March 31, 2027 preliminary-report deadline for FY27 budget development, the Team assumes the City's intended preliminary budget deliverables relate to FY27. The Team will confirm the applicable fiscal-year designation with the City at our initial project kickoff meeting*

Deferred Maintenance Cost Projection

The Team will assess facilities and asset conditions and planning-level costs of deferred maintenance. These conditions assessments will inform the magnitude of needed maintenance. Once the magnitude of maintenance is determined, the Team will estimate the cost of maintenance and the necessary annual budget needed to implement improvements. This cost projection will be analyzed by the Team to build a deferred maintenance timeline. This timeline will delineate what maintenance needs to be completed, using metrics such as cost, impact, risk, and condition to determine the sequence. With a list of all deferred maintenance needs, sorted by priority, CWF will deliver a budget impact projection for the next five years. This projection will impact the current fiscal year budget and assist with budget projections. This analysis outlines the resources needed to accomplish repairs in a timely manner, while protecting the City's financial position.

Deferred Maintenance Cost Projection Deliverables:

- Deferred Maintenance cost estimates, prioritization, and schedule
- Five-year deferred maintenance cost estimates and budget projections



Proposed Schedule



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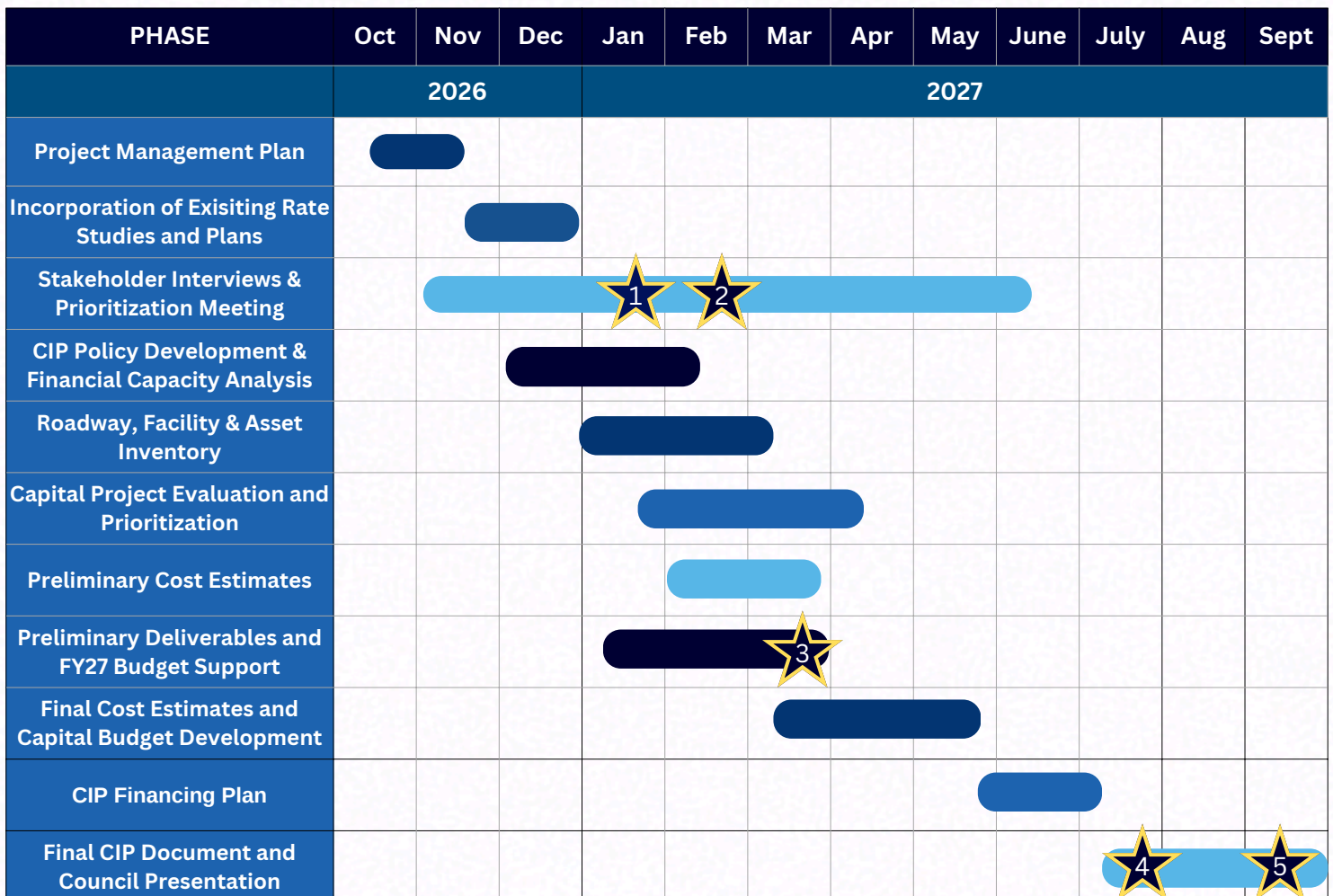
CITY OF POCA TELLO

CAPITAL IMPROVEMENT PLAN RFP RESPONSE



Proposed Schedule

To maintain the Plan schedule and provide clear direction, the Team will request one consolidated set of City comments at each major review milestone. The approach will include a coordinated review of each CIP milestone, one consolidated review of the draft Plan, and a final revision and quality-control cycle before adoption and presentation.



Site Tours
January 2027



Stakeholder Prioritization Meeting
February 2027



Initial Finding & Preliminary Report Presentation
March 31, 2027



City Review
August 2027



Final CIP Public Meeting Presentation
September 30, 2027

IV

Project Budget

POCATELLO



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CAPITAL IMPROVEMENT PLAN RFP RESPONSE



Project Budget

Deliverable	Lead	Hours	Cost
Project Management Plan	CWF	59	\$11,800
Incorporation of Existing Rate Studies and Plans	KH	156	\$31,200
Stakeholder Interviews & Prioritization Meeting	CWF	43	\$8,600
CIP Policy Development	CWF	74	\$14,800
Roadway, Facility & Asset Inventory	KH	200	\$40,000
Capital Project Evaluation and Prioritization	KH	84	\$16,800
Cost Estimates and Capital Budget Development	CWF	164	\$32,800
CIP Financing Plan	CWF	72	\$14,400
Preliminary Deliverables and FY27 Budget Support	CWF	62	\$12,400
Final CIP Document and Council Presentation	CWF	84	\$16,800
Total		998	\$199,600

The Team has allocated hours in a way to best complete the scope of work. The Team is open to adjusting the allocation of hours at the request of the City.

Total Cost

\$199,600

Hourly Rates

Below are the blended hourly rates for the project lead and associate analysts.

- CWF \$200/Hr.
- KH \$200/Hr.

Billing Schedule

Invoices will be sent monthly based on project progress.

Reimbursable Expenses

If additional out-of-pocket expenses are required, they will be reviewed and approved by the City in advance and reimbursed to CWF.

Other costs to be paid by the City:

- Travel
- Meals
- Communications
- Disclosures
- Print
- Software
- Data Sources
- Other out-of-pocket expenses

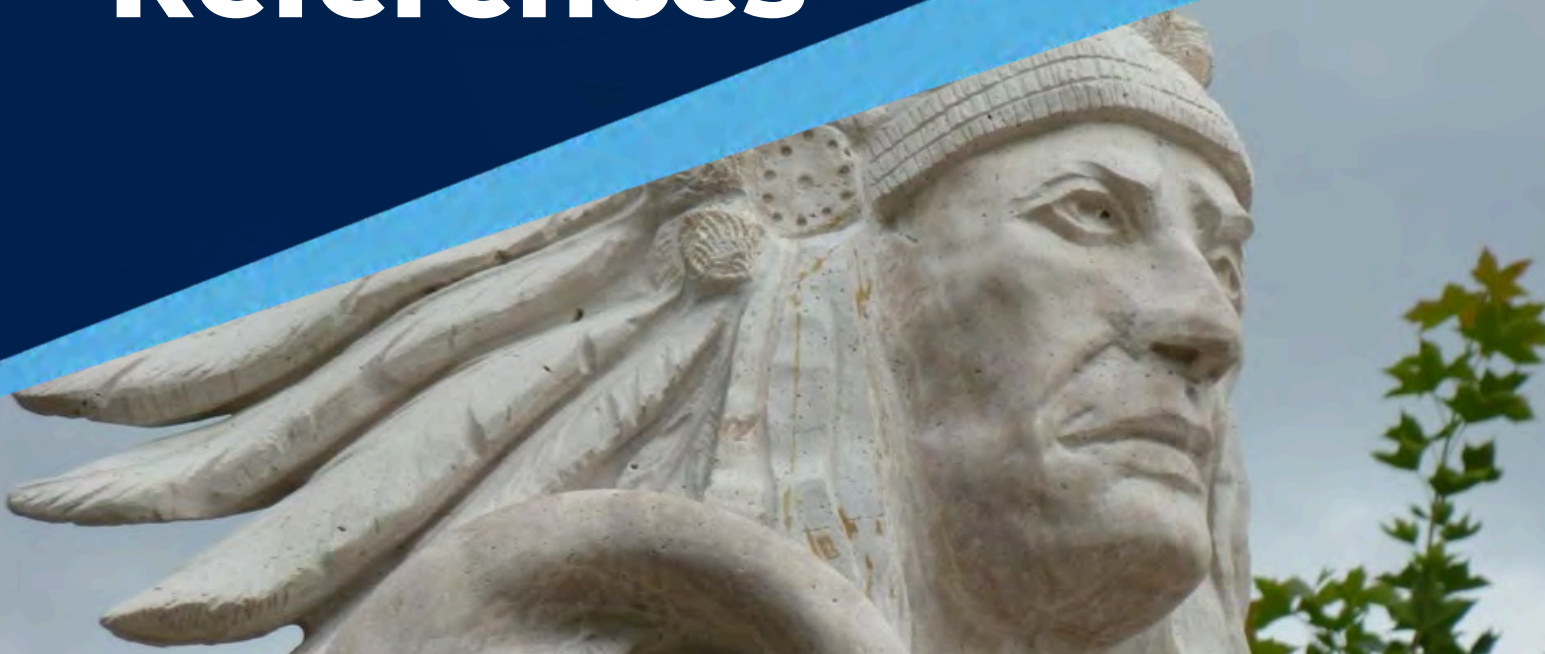
Other Services

These services are likely necessary to advance the Plan and are not included in this proposal:

- Municipal Finance (bonds and levies)
- Feasibility and Funding Analysis
- Impact Fee Development
- Master Facility Planning
- RFP/RFQ Development and Marketing
- Utility Rate Analysis
- Community Engagement
- Sustainability Planning

V

Previous Experience & References



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CITY OF POCA TELLO

CAPITAL IMPROVEMENT PLAN RFP RESPONSE



Previous Experience & References

Valley County Master Facilities and Comprehensive Financial Plans (2024)

Clearwater Financial (CWF) assisted Valley County in developing a countywide Master Facilities Plan (MFP) and Comprehensive Financial Plan (CFP), establishing a 20-year framework for prioritizing, funding, and implementing the County's facility needs. Now in its third year, the effort has moved from long-range planning into implementation. In 2024, CWF assisted the County with the acquisition of a privately owned building for use as a County annex, providing much-needed space for administrative functions. Since then, Clearwater has supported design and construction of a new Road & Bridge facility and development of the Valley County Fairgrounds Master Plan, which applies the MFP/CFP approach specifically to the Fairgrounds through site and facility planning, capital cost estimating, funding strategies, and phased implementation. The MFP has also provided a framework for County-led action. In 2025, Valley County independently initiated the Mountain Community Center District to support funding for facilities identified as a priority through the MFP.



Sherry Maupin
County Commissioner
smaupin@co.valley.id.us
208.382.7178



Nikole Zogg
District Director
Nikole.zogg@swdh.id.gov
208.455.5315

Southwest District Health Master Facilities and Comprehensive Financial Plans (2026)

Clearwater Financial developed for Southwest District Health (SWDH) a Master Facilities Plan (MFP) and Comprehensive Financial Plan (CFP) to guide facility, service delivery, and capital investment decisions across its six-county service area. The project included facility and service assessments, stakeholder engagement, demographic and operational analyses, and the development of prioritized facility and funding strategies. Through CWF's integrated planning process, SWDH established a 20-year roadmap for future facility needs, capital investments, and implementation priorities, providing a framework to adapt to changing community needs while maintaining responsible stewardship of public resources. The MFP and CFP have resulted in operational changes, including the expansion of clinic hours.



Previous Experience & References

Madison County Master Facilities and Comprehensive Financial Plan (2024)

Clearwater Financial led a 13-month strategic planning process to ensure Madison County's long-term infrastructure and financial sustainability. The plan included facility condition assessments, space allocation analysis, public engagement, and financial modeling to guide capital investments. Key recommendations included: expanding and relocating law enforcement facilities, optimizing emergency response substation placement, leveraging public-private partnerships to reduce taxpayer burden. This phased, data-driven approach provided a roadmap for sustainable public safety infrastructure, ensuring Madison County can meet future growth and service demands. Clearwater Financial's expertise in fiscally responsible facility planning made for a strong partner for Madison County's master planning.



Todd Smith
Madison County Commissioner
tsmith@co.madison.id.us
208.313.5035



Michele Rambo
Planning Director
mramba@cityoffernley.org
775.784.9815

City of Fernley, Nevada Capital Improvement Plan and Impact Fee Study (2025)

Kimley-Horn assisted the City of Fernley with development of a comprehensive capital improvement and impact fee program that evaluated infrastructure needs across multiple departments, including water, wastewater, stormwater, fire, police, and other public facilities. The effort linked growth projections, infrastructure demands, and capital investment needs to a long-term implementation and funding strategy, including identification of impact fee structures to support future capital investment.

This project is directly relevant because it demonstrates experience developing a citywide capital program that inventories needs across departments, balances competing investment priorities, and establishes a transparent framework for prioritization, funding, and phased implementation, closely mirroring the scope of work sought by the City of Pocatello.



Previous Experience & References

City of Newport, Washington Comprehensive Plan and Capital Facilities Element (2026)

Kimley-Horn is assisting the City of Newport with its Comprehensive Plan update, including preparation of the Capital Facilities and Utilities Element. The effort evaluates roads, water and wastewater systems, stormwater infrastructure, parks, public buildings, essential public facilities, and funding strategies needed to support future growth and maintain service levels. The project includes development of level-of-service standards, cost projections, and a financing plan aligned with the City's long-term fiscal outlook.

This project is highly relevant because it demonstrates how capital investment decisions can be integrated into a broader community planning framework, helping local governments align infrastructure investments with growth, community priorities, and long-term fiscal considerations, including the development of financial policies and funding strategies consistent with the scope of work described here.

NEWPORT REIMAGINED



Rooted in Tradition,
Ready for Tomorrow

Abby Gribi
City Administrator
agribi@newport-wa.org
509.447.6496



Scott Koberg
Parks & Waterways Director
skoberg@adacounty.id.gov
208.577.4578

Ada County Parks and Waterways Master Plan (2023)

Kimley-Horn prepared a master plan for Ada County's parks, recreation facilities, waterways, trails, and open spaces that included facility inventories, needs assessments, project prioritization, cost estimates, and implementation recommendations. The effort engaged stakeholders across the county to align investment priorities with community goals and available funding.

This project is relevant because it demonstrates experience applying capital planning principles to non-utility public assets and amenities in Idaho. It also reflects our ability to evaluate diverse asset types, develop realistic investment programs, and produce actionable recommendations that support community goals, directly applicable to the parks, recreation, and public facilities components of this engagement.

VI

Qualifications of the Team



CLEARWATER
FINANCIAL

CITY OF POCATELLO

CAPITAL IMPROVEMENT PLAN RFP RESPONSE



Qualifications of the Team

Clearwater Financial and Kimley-Horn offer complementary capabilities aligned with the City's evaluation criteria. Clearwater contributes project management, financial feasibility, municipal finance, implementation strategy, stakeholder engagement, and public-sector decision support. Kimley-Horn contributes capital planning, infrastructure inventories, facility and asset planning, roadway and transportation needs, GIS-based data organization, cost estimating, funding readiness, and implementation support. The Team will operate under one coordinated work plan, quality-control process, schedule, and decision framework.

Clearwater Financial

Clearwater Financial, LLC, headquartered in Boise, was founded in 2016 to help public agencies turn community priorities into practical plans, funding strategies, and implementation actions. Clearwater provides municipal advising, public engagement, planning, economic development, redevelopment, and capital strategy services to cities, counties, special districts, school districts, and other public entities throughout Idaho and the Pacific Northwest.

Clearwater Financial's services include:

- Municipal finance and implementation strategy, including capital planning, funding and financing analysis, debt and revenue evaluation, grants, impact fees, and phased investment planning.
- Public and stakeholder engagement, including engagement plans, interviews, workshops, surveys, public education, communication materials, and documentation of how input affects decisions.
- Master planning and project management, including governance, schedules, quality assurance and quality control, interdepartmental coordination, scenario development, implementation matrices, and final report production.



CLEARWATER
— FINANCIAL —

CWF's team includes municipal advisors registered with the U.S. Securities and Exchange Commission and the Municipal Securities Rulemaking Board, planners, project managers, public engagement specialists, and analysts with experience in both the public and private sectors.

Cameron Arial, Ph.D., MAP, President, will serve as Clearwater Financial's client lead. Cameron's experience as the City's municipal advisor, assisting with the City's wastewater treatment revenue bond, will provide insight and analysis to the City's capital improvement process, policies, needs, and implementation. Cameron will lead a CWF team consisting of a project manager and an operational specialist to develop the City's Capital Improvement Plan, implementation framework, and any associated financial policies.



Qualifications of the Team

Kimley-Horn

Kimley-Horn's responsibility will focus on the technical capital asset layer of the City of Pocatello Capital Improvement Plan. This includes organizing available City information for asset, property, facility, equipment, and roadway inventories; compiling known condition and deferred-maintenance needs from City records, adopted plans, prior studies, and department input; identifying data gaps; and preparing planning-level engineering cost estimates or cost ranges with documented assumptions and cost confidence ratings. Kimley-Horn will also support readiness tagging, project bundling, sequencing notes, and technical tables that help translate department needs and available asset information into a usable CIP framework.



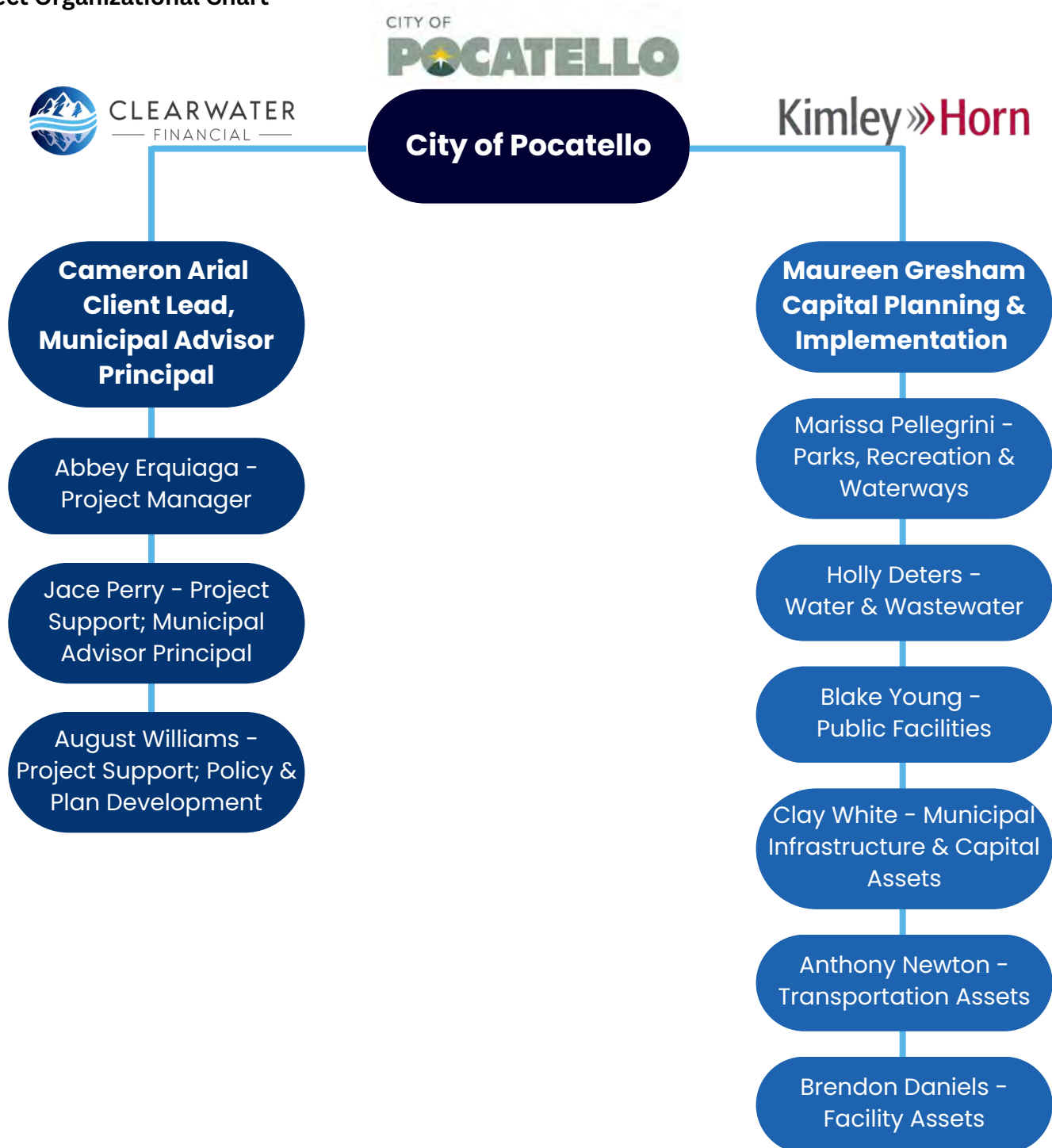
Kimley-Horn confirms that the proposed team is available and committed to supporting the City of Pocatello Capital Improvement Plan within the project schedule. Our Boise-based leadership, supported by regional and national technical resources, will provide the coordination, quality control, and responsive support needed to complete our assigned responsibilities.

Maureen Gresham, AICP, Senior Transportation Planner/Project Manager, will serve as Kimley-Horn's technical lead for this effort. Maureen will coordinate Kimley-Horn's role related to capital asset inventory development, deferred-maintenance screening, project readiness, roadway and facility-related inputs, and planning-level cost estimating support. She will draw on Kimley-Horn engineering, planning, facilities, utilities, roadway, GIS, and asset management staff as needed to support technical assumptions and cost estimates.



Qualifications of the Team

Project Organizational Chart





Cameron Arial | PhD, MAP

President

Project Lead + Municipal Advisor Principal

208.559.4353

carial@clearwaterfinancial.biz

BACKGROUND:

Cameron enjoys navigating complex projects and guiding them from plan to completion. He serves as the municipal advisor to several cities and counties in Idaho and has assisted them through the comprehensive, master, facility, and financial planning processes. As Director of Community Development for the City of Meridian, he led multiple comprehensive, capital improvement and area specific plans including public engagement. As Chief Development Officer for Athlos Academies, he led site selection, financing, and development for 7 educational campuses across multiple states, including the CCDC redevelopment of the Macy's Building in downtown Boise. He is passionate about helping individuals and governments achieve their potential.

He also served as municipal advisor to the City of Pocatello and assisted the City with the financing of its most recent wastewater treatment plant revenue bonds and the Animal Shelter public engagement campaign, successful bond election, and general obligation competitive bond sale.

EMPLOYMENT HISTORY:

- Founder/Municipal Advisor Principal, Clearwater Financial
- Community Development Director, City of Meridian
- Chief Development Officer, Athlos Academies

RELEVANT EXPERIENCE:

- Police Department Master Facility & Comprehensive Financial Plans & Public Engagement | City of Boise, ID
- Master Facility & Comprehensive Financial Plans & Public Engagement & Public Services Building Acquisition and Remodel | Elmore County, ID
- Master Facility & Comprehensive Financial Plans & Public Engagement | Madison County, ID
- Master Facility & Comprehensive Financial Plans & Public Engagement & Annex Building Acquisition & Fairgrounds Master Plan | Valley County, ID
- Jail Bond Public Engagement & Fairgrounds Master Plan & Courthouse Campus Master Plan & Master Facility & Comprehensive Financial Plans Update | Ada County, ID
- USDA Loan Financing | Eastern Idaho Regional Solid Waste District, ID
- Sewer System Financing | Eastern Idaho Regional Sewer District, ID
- TIF Financing & Highest and Best Use Analysis | Jerome Urban Renewal Agency, ID
- Sewer Impact Fees & LID Financing | City of Middleton, ID
- Comprehensive Plan | City of Hailey, ID

EDUCATION

Boise State University

- Doctorate in Public Policy & Administration
- Master of Public Administration
- Certificate Community & Regional Planning

CERTIFICATIONS

FINRA

- Municipal Advisor Principal, Series 54
- Municipal Advisor Representative, Series 50
- Municipal Securities Representative, Series 52

LEADERSHIP SERVICE

- ULI - Idaho | Executive Board Member
- Idaho 529 College Savings Program (IDEAL) | Executive Board Member
- Boise State University School of Public Service | Advisory Board Member | Public Budgeting & Finance Adjunct Professor



EDUCATION

Boise State University

- Doctorate of Philosophy, Public Policy & Administration - *In Progress*
- Master of Education, Education Leadership
- Bachelor of Science, Business Management

Abbey Erquiaga | M.Ed.

Project Manager

Project Manager

208.901.2686

aerquiaga@clearwaterfinancial.biz

BACKGROUND:

Abbey has more than 17 years of experience leading complex public-sector projects for counties, cities, higher education institutions, K-12 education systems, and community organizations throughout Idaho. Her expertise includes project management, public engagement, strategic communications, implementation planning, grant administration, financial stewardship, and intergovernmental coordination.

Abbey has successfully managed multidisciplinary consultant teams, facilitated stakeholder engagement, coordinated public outreach efforts, and developed implementation-ready planning documents for public agencies. She has extensive experience working with elected officials, executive leadership, agency staff, community organizations, business stakeholders, and the public to build consensus, communicate complex planning initiatives, and support informed decision-making. Her approach to projects helps ensure projects remain aligned with client goals, delivered on schedule, and positioned for successful implementation.

EMPLOYMENT HISTORY:

- Project Manager, Clearwater Financial
- Sr. Budget & Policy Analyst, Legislative Services Office
- Associate Director, Center for School & Community Partnerships, Boise State University
- Federal Grants Coordinator, Idaho State Department of Education

RELEVANT EXPERIENCE:

- Master Facilities Plan & Public Engagement | Bonneville County, ID
- Boise Police Department Master Facilities Plan | City of Boise, ID
- Master Facilities Plan & Comprehensive Financial Plan & Public Engagement | Southwest District Health, ID
- Master Facilities Plan Update | Ada County, ID
- Master Facilities Plan Update | Valley County, ID
- Master Facilities Plan & Comprehensive Financial Plan | Payette County, ID
- Fairgrounds Master Plan & Public Engagement | Valley County, ID
- Comprehensive Plan Update & Public Engagement | City of Buhl, ID
- Public Engagement | Payette County, ID
- Payette County Paramedics Public Engagement | City of Fruitland, ID



EDUCATION

Brigham Young
Universiry-Idaho

- Bachelor of Science,
Accounting; Minor:
Finance

CERTIFICATIONS

- Municipal Advisor
Principal, Series 54
- Municipal Advisor
Representative, Series 50
- Certified Public
Accountant
- Chartered Global
Management Accountant

LEADERSHIP SERVICE

- Board Member, West Ada

Jace Perry | CPA, CGMA, MAP

Chief Operating Officer

Municipal Advisor Principal

208.841.6794

jerry@clearwaterfinancial.biz

BACKGROUND:

Jace's 18-year career in public finance and accounting enables him to see the current and future needs of a community and ensure that funding is sufficient and timely for when public projects are planned. As a fiduciary to many of Idaho's largest governments, he treats the public's dollar as his own. His ability to deliver complex data concisely helps stakeholders, decision-makers, and the community at large understand the value of public investments and their long-term benefits.

EMPLOYMENT HISTORY:

- COO/Municipal Advisor Representative, Clearwater Financial
- Chief Financial Officer, Nextitle
- Executive Director, Idaho Bond Bank Authority
- Deputy Treasurer/Investment Accountant, Idaho State Treasurer's Office
- Auditor, Eide Bailly LLP

RELEVANT EXPERIENCE:

- Community Park Public Engagement and Downtown, Library, and Orchards Bond Financings | Lewiston, ID
- Master Facility & Comprehensive Financial Plan & Public Engagement | Valley County, ID
- Master Facility & Comprehensive Financial Plan & Public Engagement | Owyhee County, ID
- Master Facility & Comprehensive Financial Plan & Public Engagement | Elmore County, ID
- Master Facility & Comprehensive Financial Plan & Public Engagement | Madison County, ID
- Southwest District Health Master Facilities Plan & Comprehensive Financial Plan & Public Engagement | Southwest District Health, ID
- Compensation Analysis | Idaho School Boards Association, Boise, ID
- Jail Expansion Bond Public Engagement | Ada County, ID
- Fairgrounds & Courthouse Complex Master Planning | Ada County, ID
- USDA Loan Financing | Eastern Idaho Regional Solid Waste District, ID
- Sewer System Financing | Eastern Idaho Regional Sewer District, ID



EDUCATION

Louisiana State University

- Bachelor of Arts, History

August Williams

Operations Specialist

Project Support: Analysis and Plan Development

208.901.4133

awilliams@clearwaterfinancial.biz

BACKGROUND:

August spent the first eight years of his career with Harris County, Texas focusing on budgets, planning, and data analysis. August was a lead in the effort to create the Harris County Veterans Service Department in 2019, was an inaugural member of the Harris County Strategic Planning Committee, and helped develop the public engagement process for the FY 2020-2021 Harris County Budget. August's focus areas include public policy, public engagement, data analysis, and municipal budgeting. With Clearwater, August has provided analytical and public engagement support to various master planning and economic development projects. He excels in drafting clear, actionable plans for municipalities.

EMPLOYMENT HISTORY:

- Operations Specialist, Clearwater Financial
- Policy Advisor, Harris County Commissioner Precinct 3
- Manager, Strategic Solutions, Harris County Office of Management and Budget
- Policy Advisor, Harris County Commissioner Precinct 2

RELEVANT EXPERIENCE:

- Master Facilities Plan Update | Ada County, ID
- Master Facility Plan | City of Boise & Boise Police Department, ID
- Master Facilities & Comprehensive Financial Plan | Southwest District Health, ID
- Master Facilities & Comprehensive Financial Plan | Meridian Technical Charter High School, ID
- Valley County Fairgrounds Master Plan | Valley County, ID
- Elmore County Fairgrounds Master Plan | Elmore County, ID
- Development RFP Marketing and Video Creation | The URA of Twin Falls, ID
- Revenue Tool Analysis & Public Engagement | Corvallis, OR
- Comprehensive Plan | City of Nampa, ID
- Employee Satisfaction Survey | City of St. Anthony, ID
- Strategic Plan Development and Implementation | Harris County, TX
- Creation of the Department of Veterans Services | Harris County, TX



MAUREEN GRESHAM, AICP

Education

- » Master of Science (MS), City and Regional Planning, Georgia Institute of Technology
- » Bachelor of Science (BS), Community/Regional Planning and Geography, Appalachian State University

Credentials

- » American Institute of Certified Planners (AICP) (#084129)

Affiliations

- » American Planning Association (APA), Member

Capital Planning & Implementation Advisor

Maureen is a purpose-driven certified planner with 25 years of experience in urban and regional planning, transportation strategy, public sector innovation, and capital improvement program development. Her background includes senior roles with the Federal Highway Administration (FHWA), Ada County Highway District (ACHD), and Idaho Transportation Department (ITD), giving her an exceptional understanding of how local development patterns, regional mobility needs, state priorities, and funding requirements work together. She has a proven record of managing large-scale programs and teams, advancing cross-sector partnerships, and helping communities translate long-term plans into prioritized, fundable capital improvement programs. Her strengths include multimodal planning, program development, regulatory oversight, investment prioritization, and inclusive engagement, and she brings deep knowledge of federal and state funding environments to help communities identify opportunities, sequence projects, and navigate potential pitfalls.

Relevant Experience

- » **MPO Safe and Accessible Streets Toolbox | Bonneville, ID**
— Project Manager
- » **Safe Routes to School Feasibility Assessment and Public Engagement | City of Billings, MT** — Project Manager
- » **Safe Routes to School Guidebook | Local Highway Technical Assistance Council (LHTAC), ID** — Project Manager
- » **Unified Development Code | City of Gillette, WY** — Senior Planner
- » **Comprehensive Plan | City of Newton, WA** — Project Planner
- » **Transportation Master Plan | City of Surprise, AZ** — Policy and Strategy Development
- » **Bus Stop Inventory Phase 3 | Valley Regional Transit (VRT), ID** — Project Manager
- » **Long Range Transportation Plan | Fort Independence Indian Community, CA** — QC/QA Manager
- » **SH-8 Moscow to Troy Traffic and Safety Corridor Study | ITD, ID** — Deputy Project Manager
- » **Commuteride Vanpool Program | ACHD, ID** — Manager and Operator*
- » **State Street Transit and Traffic Operational Plan | ITD, ID** — ITD Representative*
- » **Bike, Pedestrian, Freight Program Study | ITD, ID** — Project Manager*
- » **Statewide Transportation Improvement Program | FHWA, ID** — Stewardship/Oversight*

*Project experience prior to joining Kimley-Horn.



MARISSA PELLEGRINI, PLA

Education

- » BS, Landscape Architecture, Purdue University

Credentials

- » Professional Landscape Architect (PLA) in ID (#2171160), AZ, NM, NV, UT, and WA

Affiliations

- » American Society of Landscape Architects (ASLA), Member
- » Council of Landscape Architectural Registration Boards (CLARB), Member
- » National Recreation and Park Association (NRPA), Member
- » Nevada Recreation and Park Society (NRPS), Member

Parks, Recreation, and Waterways

Marissa is a landscape architect and urban designer with 17 years of professional experience in landscape architecture and planning. She brings a deep portfolio including master planning, feasibility studies, inventory and analysis, site planning, consensus building through public process, stakeholder engagement, site-specific placemaking, designing creative and flexible community spaces, site retrofitting, rehabilitation and renovation, integrated drainage and amenity solutions, and construction administration. She has served as lead landscape architect and led community outreach on a wide range of multidiscipline projects including trails master plans, trail design, park revitalization, and various neighborhood, community, and regional parks and recreation facilities.

Relevant Experience

- » **CIP and Impact Fee Study | City of Fernley, NV** — Parks Lead
- » **Parks and Waterways Master Plan | Ada County, ID** — Project Manager
- » **Parks, Recreation, Open Space, and Trails Master Plan | City of Snoqualmie, WA** — Project Manager
- » **Parks, Recreation, and Open Space Master Plan | City of Prosser, WA** — Project Manager
- » **Systemwide Parks and Recreation Master Plan | City of Scottsdale, AZ** — Project Manager
- » **Parks and Recreation Master Plan | City of Buckeye, AZ** — Project Manager
- » **Parks Conditions Assessment | City of Glendale, AZ** — Project Manager
- » **Goodyear Game Plan: Systemwide Parks, Recreation, and Trails Master Plan | City of Goodyear, AZ** — Deputy Project Manager
- » **Recreation Campus Master Plan and Final Design | City of Goodyear, AZ** — Deputy Project Manager
- » **Trails Master Plan | Town of Oro Valley, AZ** — Project Manager
- » **District Parks, Recreation, Trails, and Open Space Master Plan | City of Jurupa Valley, CA** — Landscape Architect
- » **Parks, Recreation, Trails, and Open Space Master Plan | City of Littleton, CO** — Landscape Architect
- » **Parks and Recreation Master Plan | City of Phoenix, AZ** — Landscape Architect
- » **Parks and Recreation Master Plan | City of Palmdale, CA** — Landscape Architect



HOLLY DETERS, PE

Education

- » Master of Engineering, Environmental Engineering, Southern Methodist University
- » BS, Environmental Engineering, Southern Methodist University

Credentials

- » Professional Engineer (PE) in TX (#146262)

Water/Wastewater

Holly has nine years of water and wastewater design experience working with public clients. She has project experience in water infrastructure and storage design, wastewater infrastructure design, water and wastewater master planning, water and wastewater treatment plant design, permitting, and funding applications. She is proficient in AutoCAD and ArcGIS. Holly is passionate about bringing a project from initial concept and planning during a master plan to implementation after construction.

Relevant Experience

- » **Water and Wastewater Master Plan | City of Josephine, TX** — Project Manager
- » **Wastewater Master Plan Update | City of Red Oak, TX** — Project Manager
- » **Water Master Plan Update | City of Red Oak, TX** — Project Engineer
- » **Downtown 2025 Water and Wastewater Improvements | City of Celina, TX** — Project Manager
- » **Water Master Plan Update and Pump Station No. 1 Upgrade | Bear Creek Special Utility District, Lavon, TX** — Project Manager
- » **Pump Station No. 2 Pressure Plane No. 1 Improvements | Bear Creek Special Utility District, Lavon, TX** — Project Manager
- » **3 MG Low Pressure Plane Elevated Storage Tank No. 2 | City of Celina, TX** — Project Engineer
- » **Southeast Ground Storage Tank | City of Celina, TX** — Project Engineer
- » **Sewer Capacity Study | City of Dalworthington Gardens, TX** — Project Engineer
- » **Bear Creek SUD On-Call (Water Modeling and Development Review) | Bear Creek Special Utility District, Lavon, TX** — Project Manager
- » **Water Master Plan | City of DeSoto, TX** — Project Engineer*
- » **Water and Wastewater Master Plan | City of Celina, TX** — Project Engineer*
- » **Legacy Hills Water Reclamation Facility | City of Celina, TX** — Project Engineer*
- » **Downtown Wastewater Treatment Plant Improvements | City of Celina, TX** — Project Engineer*
- » **Pump Station Improvements (Phases 1–3) | City of Celina, TX** — Project Engineer*

*Project experience prior to joining Kimley-Horn.



BLAKE YOUNG, AICP

Education

- » BS, Urban Planning,
University of Cincinnati

Credentials

- » AICP (#33686)

Affiliations

- » APA, Member
- » Congress for the New
Urbanism (CNU), Member

Public Facilities

Blake is an urban planner and designer with 10 years of experience helping communities translate long-range plans into actionable public facility investments. His work includes capital improvement planning, impact fee studies, comprehensive and subarea planning, downtown master plans, mobility-focused corridor plans, and public facility strategies that connect growth, service needs, and funding priorities. He brings a practical approach to identifying facility needs, prioritizing projects, and aligning reinvestment opportunities with public planning initiatives to support market-feasible and sustainable growth. Blake leads Kimley-Horn's long-range planning team in Downtown Denver and has national experience managing comprehensive plans, subarea plans, community engagement, and large-scale master plans that help local governments move from vision to implementation.

Relevant Experience

- » **CIP and Impact Fee Study | City of Fernley, NV** — Project Manager
- » **Comprehensive Plan | Town of Kiowa, CO** — Project Manager
- » **Comprehensive Plan | Elbert County, CO** — Project Manager
- » **Comprehensive Plan | City of Cripple Creek, CO** — Project Manager
- » **Economic Development and Tourism Strategy Plan | City of Cripple Creek, CO** — Project Manager
- » **North and Southwest Area Plans | City of Fernley, NV** — Project Manager
- » **Grant Road Corridor Plan | City of Tucson, AZ** — Project Manager
- » **Master Plan | City of Georgetown, KY** — Project Manager
- » **PlanSachse Comprehensive Plan | City of Sachse, TX** — Planning Lead
- » **Propelling Downtown Forward | City of Fort Smith, AR** — Planning Lead
- » **Perry Lane Master Plan and Entitlements | City of Parker, CO** — Urban Design Lead
- » **Downtown Master Plan | City of Frisco, TX** — Urban Design Lead
- » **Towne Center Overlay | City of Heath, TX** — Urban Design Lead
- » **Neighborhood Planning Initiative Near Southeast | City and County of Denver, CO** — Project Planner
- » **Flaming Gorge Way Corridor Study | City of Green River, WY** — Project Planner
- » **Transportation and Mobility Plan | City of Manitou Springs, Manitou Springs, CO** — Project Planner
- » **Everett Link Extension (EVLE) and Operations and Maintenance Facility (OMF) North | Sound Transit, Everett, WA** — Planning Lead



CLAY WHITE

Education

- » Bachelor of Arts (BA), Geography, Central Washington University
- » BA, Anthropology, Central Washington University

Affiliations

- » Planning Association of Washington (PAW), Board Member
- » Washington State Association of Regional and County Planning Directors, Former President
- » Washington State Transportation Improvement Board, Former Member
- » Puget Sound Regional Council (PSRC) Regional Staff Committee, Former Co-Chair

Municipal Infrastructure/Capital Assets

Clay has 27 years of experience serving cities, counties, and private-sector clients throughout Washington state as a land use planner, including nearly 18 years working directly for local governments. His public-sector leadership experience includes service as Planning and Development Services Director for Snohomish County and Land Services Director for Stevens County, giving him firsthand understanding of how comprehensive planning, capital improvement programs, infrastructure needs, land use policy, and public investment decisions intersect. Throughout his career, Clay has helped local governments develop and implement practical policies aligned with community goals, funding realities, and long-term service needs. His experience includes leading comprehensive plan updates with climate and resiliency elements, supporting multijurisdictional planning efforts such as Hazard Mitigation Plans (HMPs), developing land use legislation and guidance for the Washington State Department of Commerce, and helping communities connect policy direction to capital project priorities. He is passionate about earning client trust and developing proactive project management plans that keep projects on time, within budget, and focused on implementable outcomes.

Relevant Experience

- » **Comprehensive Plan Update, CIP, and Climate Element | Skagit County, WA** — Project Manager
- » **Comprehensive Plan Update, CIP, and Climate Element | Lewis County, WA** — Project Manager
- » **Comprehensive Plan Update, CIP, and Climate Element | Kittitas County, WA** — Project Manager
- » **Comprehensive Plan Update, CIP, and Climate Element | Walla Walla County, WA** — Project Manager
- » **Comprehensive Plan Update | Spokane County, WA** — Senior Consultant
- » **Comprehensive Plan Update, CIP, and Climate Resilience Element | City of Oak Harbor, WA** — Project Manager
- » **Comprehensive Plan Update | Thurston County, WA** — SEPA Environmental Impact Statement (EIS) Built Environment and Housing Policy Advisor
- » **Multi-Jurisdictional Natural Hazard Mitigation Plan Update | Skagit County, WA** — Senior Project Consultant
- » **Hazard Mitigation Plan Update | Stevens County, WA** — Project Manager
- » **Urban Growth Area and Rural Guidebooks | Washington State Department of Commerce, Statewide, WA** — Project Manager
- » **Middle Housing Model Ordinances for Implementation of HB 1110 | Washington State Department of Commerce, Statewide, WA** — Housing Policy Expert



ANTHONY NEWTON, PE

Education

- » BS, Civil Engineering, Boise State University

Credentials

- » PE in ID (#21023) and NV

Transportation Assets

Anthony is a skilled civil engineer and experienced project manager based in Boise, ID, with nine years of experience serving public- and private-sector clients across the Pacific Northwest. His work supports capital improvement programs by translating public works needs into practical, constructible horizontal asset projects, including streets, drainage, utilities, maintenance facilities, and site infrastructure. He is familiar with federal, state, and local agency requirements and brings strong management, coordination, and design experience to projects that must move from planning and prioritization into phased implementation. Anthony is highly skilled in site grading and drainage design, communicates effectively with clients and project teams, and has a track record of delivering projects on schedule and under budget.

Relevant Experience

- » **George Nourse Gun Range 4-Year Phased Construction Plans | Canyon County, ID** — Project Manager
- » **Apple and Ustick Maintenance Yards | ACHD, ID** — Lead Civil Engineer
- » **Stoddard Road Widening | ACHD, ID** — Deputy Project Manager
- » **Locust Grove and Palermo Pedestrian Crossing | ACHD, ID** — Lead Civil Engineer
- » **Leading Pedestrian Interval Uncoordinated Signals Phase 1 | ACHD, ID** — Roadway Design Lead
- » **Columbia Village Neighborhood Plan | ACHD, ID** — Roadway Design Lead
- » **Hollandale-Targee Neighborhood Plan | ACHD, ID** — Project Engineer
- » **US-91 Roadway Widening, Park Lawn to Siphon Road | ITD, ID** — Project Engineer
- » **SH-8 Moscow to Troy Planning and Environmental Linkages Study | ITD, ID** — Project Engineer
- » **21st Street Fiberseal Progressive Design-Build | City of Lewiston, ID** — Deputy Project Manager
- » **8th Street, Main to Bannock | City of Boise, ID** — Project Engineer
- » **Center Street District Infrastructure Development | Baseline Metropolitan District No. 1, CO** — Roadway Design Lead
- » **500-Acre Development | Coeur d'Alene Tribe, ID** — Project Manager
- » **Highway 55 Northern Underpass | Avimor Development, ID** — Project Engineer



BRENDON DANIELS, PE

Education

- » MBA, Boise State University
- » BS, Civil Engineering, Gonzaga University

Credentials

- » PE in ID (#17135), WA, and NV

Affiliations

- » Urban Land Institute (ULI), Idaho District Council Chair

Facility Assets

Brendon has 15 years of civil engineering experience, including 12 years in Idaho working on building-related facility assets, stormwater, site development, utility, and roadway projects. His work supports capital improvement programs by helping public clients plan, design, and deliver building and facility projects that must function well for staff, visitors, vehicles, and long-term operations. He has extensive experience with urban and constrained site design, including multi-family residential buildings, complex ADA design, and green stormwater infrastructure. He has also led landside facility projects at Boise Airport, including parking garages, hangars, snow removal facilities, and phased parking improvements that require close attention to user volume, operational needs, permitting, and constructability. He integrates private-sector knowledge with client operational needs to create holistic, efficient, and successful multidisciplinary project plans that move facility investments from concept through implementation.

Relevant Experience

- » **Employee Parking Garage | Boise Airport, ID** — Overall Project Manager and Civil Engineer of Record*
- » **ITD Aeronautics Hangar | Boise Airport, ID** — Overall Project Manager and Civil Engineer of Record*
- » **Economy Parking Lot Expansion (Multiple Phases) | Boise Airport, ID** — Civil Engineering Project Manager*
- » **East Public Parking Garage | Boise Airport, ID** — Civil Engineering Project Manager*
- » **Gowen Central Ditch Improvements | Idaho Military Division, ID** — Project Manager*
- » **Employee Parking Expansion | Western Aircraft, ID** — Project Manager*
- » **Warm Springs Golf and Clubhouse | City of Boise, ID** — Project Manager*
- » **EVLE and OMF North | Sound Transit, Everett, WA** — Project Engineer/Quality Control
- » **Economy Parking Consolidation | Spokane International Airports, Spokane, WA** — Project Manager
- » **Ten Mile District – Commercial Development | Ahlquist Development, LLC, ID** — Project Manager
- » **Lusk District Multi-Family Development | J. Fisher Companies, ID** — Project Manager
- » **Idaho Transportation Headquarters – Utility Master Plan and Site Renovations | Idaho Department of Public Works, ID** — Civil Project Manager

*Project experience prior to joining Kimley-Horn.

July 9, 2026

To Whom It May Concern:

I am pleased to recommend Cameron Arial and Clearwater Financial. I write in my personal capacity, based on my own experience working with Cameron, and I do not speak for the Pocatello Development Authority or the City of Pocatello.

My experience with the Pocatello Development Authority (PDA) spans roughly fifteen years and three separate appointments. I served as a citizen member of the PDA board from 1999 to 2010, including five years as Chairman from 2005 to 2010. I later returned to the board as the City Council's representative while serving as Council President, and again as the Bannock County Board of Commissioners' representative while serving as Commission Chairman. I also served on the Pocatello City Council from July 2010 to December 2017.

Over those years I worked with Cameron on several of the City's and the PDA's most significant economic development initiatives. On the PDA's North Yellowstone Urban Renewal District, he advised the board through multiple financings and refinancings that supported ongoing redevelopment in the area. His ability to read market conditions, spot refinancing opportunities, and explain complex alternatives to elected officials proved invaluable, and the district has seen meaningful redevelopment and private investment since.

Cameron also served as the City's municipal advisor on major wastewater system improvements, giving the City confidence it was making informed, fiscally responsible decisions on infrastructure critical to continued growth. And during the City's animal shelter bond initiative, he developed and managed an engagement program through public meetings, informational materials, tax impact analysis, and outreach which helped the City clear the two-thirds supermajority Idaho requires for general obligation bonds, then advised the City through the competitive bond sale.

Throughout, Cameron took the time to understand the goals of elected officials and the communities they serve and consistently placed his clients' interests first. For the record, I hold no current position with the PDA or the City of Pocatello, and I have no financial interest in the selection of Clearwater Financial.

I recommend Cameron Arial and Clearwater Financial without reservation to any municipality, urban renewal agency, or public organization seeking an experienced and trusted municipal advisor. Please contact me with any questions.

Sincerely,



Steven Brown
2345 Gail Dr
Pocatello, ID 83201
208-604-2138

Former Member, Pocatello Development Authority
Former Member, Pocatello City Council
Former Member, Bannock County Board of Commissioners

VII

Required Forms



CLEARWATER
FINANCIAL

CITY OF POCA TELLO

CAPITAL IMPROVEMENT PLAN RFP RESPONSE

City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix A. Price Proposal

Price Proposal Form - City of Pocatello Capital Improvement Plan RFP

The undersigned proposes to provide services to the City of Pocatello in accordance with the response to its Request for Proposals (RFP). This price includes all services and out of pocket expenses as per the terms and specifications stated in the non-price proposal. Price includes but is not limited to all deliverables listed in the RFP.

\$ \$199,600

All-inclusive fees

One hundred ninety-nine thousand, six hundred Dollars

Written sum

On a separate page or pages, please provide details of proposed deliverables and schedule of associated payments. Please also provide a detailed breakdown of the labor rates and estimated labor hours for each staff member in the proposal.



Signature (blue ink please)

Jace Perry

Printed Name

COO

Title

08/20/2026

Date

Clearwater Financial, LLC

Company Name

2300 S. Orchard St. Suite E

Street

Boise, ID 83705

City, State, Zip

Jperry@clearwaterfinancial.biz

Email

208.841.6794

Phone

Fax

City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix B. Non-Collusion Affidavit

NON-COLLUSION AFFIDAVIT

THIS FORM IS TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL.

STATE OF Idaho)

:SS

COUNTY OF Ada)

Jace Perry, being first duly sworn, deposes and says that he or she is COO of Clearwater Financial, LLC, the (sole owner, partner, president, secretary, etc.) party making the foregoing proposal, that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company association, organization, or corporation; that the bid is genuine and not collusive or sham; that the Respondent has not directly or indirectly induced or solicited any other respondent to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any respondent or anyone else to put in a sham proposal, or that anyone shall refrain from responding; that the Respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Respondent or any other respondent, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other respondent, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the Proposal are true; and further, that the Respondent has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal.

Signed: [Signature]

Title: COO

Subscribed and sworn to before me

This 17th day of August, 2026

(SEAL)

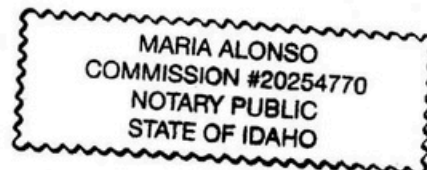
Notary Public in and for the

County of Ada

State of Idaho

Residing at Boise, ID

My Commission expires 12/01/2031



Appendix B. Non-Collusion Affidavit

NON-COLLUSION AFFIDAVIT

THIS FORM IS TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL.

STATE OF Idaho

:SS

COUNTY OF Ada

Brandon Mc Dougald, being first duly sworn, deposes and says that he or she is Vice President of Kinley Home and Associates, Inc. (sole owner, partner, president, secretary, etc.) party making the foregoing proposal, that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company association, organization, or corporation; that the bid is genuine and not collusive or sham; that the Respondent has not directly or indirectly induced or solicited any other respondent to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any respondent or anyone else to put in a sham proposal, or that anyone shall refrain from responding; that the Respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Respondent or any other respondent, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other respondent, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the Proposal are true; and further, that the Respondent has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal.

Signed: [Signature]

Title: Vice President

Subscribed and sworn to before me

This 18th day of August, 2026

(SEAL)

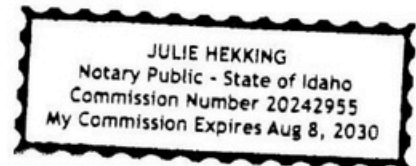
Notary Public in and for the

County of Ada

State of Idaho

Residing at 1100 W Idaho St, Ste 210, Boise, ID 83702

My Commission expires August 8, 2030



City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix C: Affidavit of Payment or Securement of All Taxes

AFFIDAVIT OF PAYMENT OR SECUREMENT OF ALL TAXES

THIS FORM IS TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL.

STATE OF Idaho

:SS

COUNTY OF Ada

Jace Perry, COO, Clearwater Financial, being first duly sworn, deposes and says that (Bidder)

he or she is in conformance with Idaho Code 63-15-2; affiant (is/is not)

states that Clearwater Financial, LLC has paid or secured to the satisfaction of the (Bidder)

respective taxing units all taxes for which he or his property is liable now due or delinquent including assessments, excises, and license fees levied by the State of Idaho or any taxing unit within the State of Idaho or the taxing unit of the applicable state within which the Respondent's business is located.

Dated this 17 day of Aug, 2026.

Signed:



Title:

COO

Subscribed and sworn to before me

This 17th day of August, 2026

Notary Public in and for the

County of Ada

State of Idaho

Residing at Boise, Idaho

My Commission expires 12/01/2031

(SEAL)

MARIA ALONSO
COMMISSION #20254770
NOTARY PUBLIC
STATE OF IDAHO

City of Pocatello Capital Improvement Plan (2)

Date Issued: July 21, 2026 after 8:00AM MT

Appendix C: Affidavit of Payment or Securement of All Taxes

AFFIDAVIT OF PAYMENT OR SECUREMENT OF ALL TAXES

THIS FORM IS TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL.

STATE OF Idaho

:SS

COUNTY OF Ada

Kimley-Horn and Associates, Inc being first duly sworn, deposes and
says that (Bidder)

he or she is in conformance with Idaho Code 63-15-2;
affiant (is/is not)

states that Kimley-Horn and Associates, Inc has paid or secured to the satisfaction
of the (Bidder)

respective taxing units all taxes for which he or his property is liable now due or delinquent
including assessments, excises, and license fees levied by the State of Idaho or any taxing
unit within the State of Idaho or the taxing unit of the applicable state within which the Respondent's
business is located.

Dated this 18th day of August, 20 26.

Signed: [Signature]

Title: Vice President

Subscribed and sworn to before me

This 18 day of August, 20 26

(SEAL)

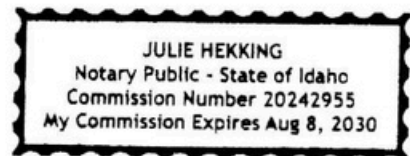
Notary Public in and for the

County of Ada

State of Idaho

Residing at 1100 W Idaho St, Ste 210, Boise, ID 83702

My Commission expires August 8, 2030



We look forward to working with you



CLEARWATER
— FINANCIAL —