

ITEM 9.J.

MOORPARK CITY COUNCIL AGENDA REPORT

TO: Honorable City Council

FROM: Ron Ahlers, Finance Director 

DATE: January 10, 2011 (City Council Meeting of January 19, 2011)

SUBJECT: Consider Conducting a Citywide Survey and Engineering Work to Seek an Increase in Assessments for Street Lighting and Landscaping and Resolution Amending the Fiscal Year 2010/11 Budget to Fund the Proposal

BACKGROUND

In February 2010 the City Council received a report from staff reviewing various possibilities for revenue enhancement measures that might be considered. The Finance, Administration and Public Safety (FAPS) Committee reviewed these measures at a meeting on February 9, 2010. At the May 27, 2010 City Council Budget Workshop, the discussion centered on the Landscape Maintenance and Lighting Districts and their financial viability. The City Council directed staff to update that report and present it to the FAPS Committee. The FAPS Committee reviewed the report on July 7, 2010 and directed staff to request proposals for conducting a city-wide mail ballot on increasing the fees in the landscape maintenance districts. Staff solicited two proposals; one from our current provider of engineering services for the LMDs (SCI Consulting Group) and the other from Willdan Financial Services. On January 5, 2011, the FAPS Committee met to discuss these two proposals. The FAPS Committee concurred with staff's recommendation that we present this item to the City Council for consideration.

In order to increase assessments or add a new district a City must follow a number of steps. First, the City must determine if the property owners will receive a "special benefit" from the project or service proposed to be financed by the assessment. The special benefit must be a benefit to land and buildings or else it cannot be financed with the assessment. Once it has been determined that the property owners will receive a special benefit, then the City is required to use a professional engineers report to estimate the amount of special benefit landowners would receive from the project or service, as well as the general benefit. If the split of special benefit to general benefit is 50/50 then the assessment can only pay for 50% of the total project cost. Once the amount is set, the City must set individual assessment charges so that no property owner pays more than their fair share of the total cost. This may require setting assessment rates on a parcel by parcel basis.

Once all of this information has been calculated and completed, the City must mail information regarding the assessments to all property owners. Each notice must contain a mail-in ballot for the property owner to indicate approval or disapproval of the assessment. After the notices are mailed, the City must hold a public hearing, at the conclusion of which, the ballots will be tabulated and weighted based on the amount of the assessment that each property owner would pay. An affirmative majority of property owners who voted is needed in order to impose the assessment.

DISCUSSION

Attached, please find the proposals from SCI Consulting Group (SCI) and Willdan Financial Services (Willdan).

SCI CONSULTING GROUP (SCI)

SCI has performed the annual administration and engineering work for the LMDs for a number of years. They have worked well with the City staff in the past.

The SCI proposal is segregated into two main tasks, with their associated fees:

1. Initial Analysis, Assessment Engineering and Planning	\$ 6,500
2. up to 12 unique Surveys and Feasibility Analysis	\$ 29,500
3. Outreach services for up to 12 districts	\$ 5,000 to \$ 15,000
4. Engineer's Report for up to 12 districts	\$ 1,000 to \$ 45,681
5. Assessment Balloting for up to 12 districts	\$ 1,000 to \$ 44,522
6. Incidentals	\$ 2,800
Total project cost of	\$ 45,800 to \$ 144,003
Plus cost of tabulating ballots (if not performed by the clerk)	

Survey and Public Outreach/Education

SCI's approach is to place the emphasis on an accurate prediction of the election results by using a mail survey that closely mimics that of the true mail-ballot. This survey is sent to large percentage of the total property owners within each district. The proposal states that the survey will contact up to 10,600 property owners. The survey will also take into consideration the weighted amount of vote that each property owner is allocated. As a result, a reliable predictor of the actual election can be ascertained from the survey. Their approach is to conduct a mail survey of the property owners to accurately predict the outcome of a potential mail-ballot for an increase in the LMD fees. Upon the tabulation of the survey SCI will recommend which districts to recommend to the City to pursue. The main focus of the public outreach/education program is a "grass-roots" effort led by citizen-leaders who will promote the benefits of the increased assessments to the property owners. This process involves face-to-face contact with the voters in addition to the printed materials component. SCI provided an example of their printed materials.

After the mail-ballot is held, the City Council holds a public hearing to tabulate the results of the vote and to hear from the property owners. The tabulation of the votes can be conducted by the City Clerk or we could utilize the services of a public accounting firm to tabulate the results. This extra cost may be well worth the money to

ensure the independence of the tabulation process along with accuracy and timeliness of the results.

WILLDAN FINANCIAL SERVICES (WILLDAN)

Willdan also presented a proposal for their services. They will need to perform more work since they do not provide engineering services for the City's LMDs. The tasks they have outlined are:

- A. Review and Benefit Analysis for a City-wide Assessment
- B. Survey/Polling of Potential Citywide District (Optional)
- C. Finalize Assessment Analysis
- D. Documentation and Procedural Requirements for Proposed New Assessments
- E. Public Education/Outreach Program (Optional)
- F. Property Owner Balloting

Their fee structure is:

Assessment Engineering and Balloting Services	\$ 42,600
Survey /Polling of Potential New Citywide District (Optional)	\$ 13,600 - \$ 16,000
Public Education/Outreach Program (Optional)	<u>\$ 25,000 - \$ 35,000</u>
Total	\$ 81,200 - \$ 93,600

Willdan's proposal does not include a variety of in-direct expenses:

- Printing, processing, postage of notices and ballots
- Out-of-pocket travel and other expenses for the Public Outreach consultant
- Printing, processing, postage for the Public Outreach/Education brochures

The above costs not included in the proposal can be substantial depending on the number of property owners contacted. It would be fair to estimate that the total cost to the City would be in excess of \$100,000.

Survey and Public Outreach/Education

Willdan would sub-contract with National Demographics Corporation (NDC) to perform the survey work and analysis. The survey is done by mail or by telephone or on-line. NDC writes the questions in consultation with Willdan and the City. The survey is conducted over several days for the phone portion, several weeks for the mail portion. After the data gathering, NDC will prepare a report and presentation for the City. It does not appear that they "weight" the survey responses to correspond with the "weighting" of the properties.

Willdan proposes the firm, The Lew Edwards Group (LEG) for public outreach and education. This firm assisted Willdan with the Arcadia district which passed with a 60% approval. The LEG strategy is to include: direct mail campaign, media/internet stories and a speaker's bureau to key organizations in the Moorpark community along with Community Messengers to get the word out.

Willdan will assist the City Clerk in tabulation of the ballots using barcode scanning.

FISCAL IMPACT

The cost of the proposal is: SCI \$ 45,800 to \$ 144,003 plus ballot tabulation (if we use an outside firm) Willdan \$100,000+.

TIME-LINE (Tentative, subject to change)

January 5, 2011	FAPS Committee Review, if approved
January 19, 2011	City Council Review, if approved
January 20, 2011	Engage SCI or Willdan to perform the work
April 20, 2011	Council Resolution to approve the preliminary engineer's report and authorize the mailing out of the ballots
April 29, 2011	Mail out the ballots
June 15, 2011	Public Hearing; Tabulate ballots; Council Resolution to approve the final engineer's report
July 6, 2011	Submit levy amounts to Ventura County

FAPS Committee Recommendation

The FAPS Committee recommends that the City Council engage the firm of SCI to perform the work. SCI is selected because of the on-going good working relationship with the City and the past successful passage of the parks assessment district formation. The committee recommends that SCI perform only a portion of the proposed work; specifically the polling and engineering calculations for the increased assessment on the landscaping and lighting districts. After completion of the first portion of the work, then the City Council can decide if and when to conduct the mail ballot to the affected property owners. The estimated amount to do the polling and engineering work is \$100,000. This money can come from the June 30, 2010 General Fund surplus.

STAFF RECOMMENDATION (ROLL CALL VOTE)

1. Authorize the City Manager to execute an agreement with SCI subject to final language approval by the City Manager and City Attorney.
2. Adopt Resolution No. 2011-_____.

ATTACHMENTS

- | | |
|---------------|-----------------------|
| Attachment 1. | SCI Proposal |
| Attachment 2. | Willdan Proposal |
| Attachment 3. | Resolution 2011-_____ |

PROPOSAL

FOR THE

CITY OF MOORPARK

TO PROVIDE

**NEW REVENUE FEASIBILITY ANALYSIS,
ASSESSMENT ENGINEERING, BALLOTING AND
PROFESSIONAL CONSULTING SERVICES FOR
INCREASED FUNDING**

OCTOBER 2010

SUBMITTED BY:

SCIConsultingGroup

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FAIRFIELD, CALIFORNIA 94534

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FAX: 707.430.4319

www.sci-cg.com



SCI Consulting Group

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October 12, 2010

Ron Ahlers, Finance Director
City of Moorpark
799 Moorpark Ave
Moorpark, CA 93021

Dear Ron:

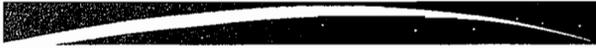
SCI Consulting Group (SCI) is pleased to submit the enclosed proposal for assisting the City first with **accurately** evaluating the **opportunities** for increased assessment funding and second with **implementing** such important new sources of revenue. We understand that the City is subsidizing the cost of services and improvements in certain zones and assessment districts within the City. We also understand that a primary objective of the project is to successfully navigate the most appropriate avenues for new revenues.

We respectfully offer that our firm stands alone in its ability to assist the City with this important and challenging project. Winning new revenues in these difficult times is no easy task. In fact, **on a statewide basis, well over 50% of the proposed new or increased assessments for developed areas lead by other assessment engineering firms have been unsuccessful.** In contrast, SCI is the only firm with not only a winning overall record for developed area and agency-wide assessments, but with an industry high 95% win rate for new or increased assessments.

We have structured our proposed services to maximize your City's prospects for successful new assessment ballot measure outcomes. Further, we respectfully offer that our ability to assist the City in **winning** new funding measures and meeting all of the vital and nuanced legal requirements for benefit assessments is unmatched. We feel that our firm and our team are uniquely qualified to provide the requested professional services for the following reasons:

OUR PROPRIETARY AND PROVEN SURVEY APPROACH WILL PROVIDE ACCURATE MEASURES OF THE NEW REVENUE OPPORTUNITIES FOR CITYWIDE LIGHTING AND LANDSCAPING AND FOR EACH OF THE 11 ASSESSMENT ZONES WITH DEFICITS - Over twelve years ago, we learned firsthand that phone surveys yield **highly inaccurate** predictions for property owner benefit assessments. As a result, our firm pioneered the integration of initial assessment engineering and weighted ballot property owner analysis into a highly specialized opinion research approach specifically tailored to address the many unique aspects of a mailed, weighted ballot benefit assessment. On over 100 other surveys to date, this approach has been consistently proven to provide much more accurate survey results for benefit assessments and parcel taxes than the phone and mail survey methods used by other firms. Our opinion research work will provide the City with the valuable information needed to make the best decisions on what specific new funding measures should be proposed and how best to message and manage each measure.

PROFESSIONAL ASSESSMENT ENGINEERING QUALIFICATIONS - Unlike parcel taxes, benefit assessments have significant legal justification requirements, including that the new or increased assessments must be created by a registered professional engineer certified by the State of California. If these important legal and assessment engineering requirements are not



SCI Consulting Group

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well met, your new assessment can be at material risk of legal challenge. John Bliss, P.E., M.Eng., the Vice President of SCI, holds a Masters in Civil Engineering from the University of California, Berkeley and was a Regent's scholar. Mr. Bliss has created more new agency wide post-218 benefit assessments and more new assessments for landscaping and lighting than any other engineer in the State. His level of professional and assessment engineering expertise is clearly unmatched. Moreover, we proposed to create individual, customized, stand-alone Engineer's Reports for each proposed new assessment, because this approach, while more time consuming to establish, will greatly improve the legal defensibility of each new assessment.

KNOWLEDGE OF THE CITY AND PROVEN RESULTS – SCI Consulting Group successfully created the Moorpark Citywide parks and recreation assessment district and led the winning assessment ballot measures for Rancho Simi RPD, Conejo RPD, Pleasant Valley RPD and several other successful new assessments for the County of Ventura. This is more local experience and success with new assessments **for developed areas** than any other firm in the State. If selected for this project, SCI would utilize its extensive local experience to implement ballot measure and outreach strategies with the proven ability to be effective in the City. Moreover, we will coordinate a true "boots on ground" volunteer effort, because this type of hand's on, volunteer led approach is clearly the most effective. (Many consultants use a "hands off" approach that overly relies on printed/mailed media, which, while easy to implement, is typically not very effective.)

ASSESSMENT BALLOTING RESULTS - With 25 years of experience in this specialized field, we are proud of our industry-leading record of accomplishment with new assessment district formations and local ballot measures. For district-wide funding measures such as the proposed new assessment or parcel tax for the City, SCI has a success rate of 95% with 99 successful funding measures to date. Based on a recent statewide analysis, SCI has lead more successful Proposition 218 assessment balloting projects than all other firms in the State combined. Moreover, while our win rate for developed area assessments is 95%, the average assessment ballot win rate for other firms is only 50%.

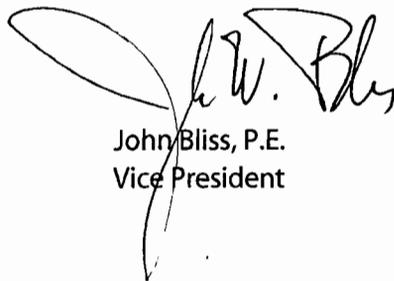
CUSTOMER SERVICE AND CLIENT SATISFACTION - Our new business comes almost entirely from word-of-mouth referrals by our clients. We highly encourage you to contact our other clients who can attest to the level of service we provide, the long-term relationships we have developed, the unmatched accuracy of our survey approach, our unmatched experience with landscaping and lighting funding measures and our industry-leading track record of winning assessment ballot measures.

If you have any questions or require additional information, please do not hesitate to contact us. We thank you for the opportunity to provide this proposal and look forward to assisting the City with successfully completing this important project.

Sincerely,



Gerard van Steyn
President



John Bliss, P.E.
Vice President



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PROJECT UNDERSTANDING AND OVERVIEW

SCI understands that the City of Moorpark is funding a significant portion of its City-wide landscaping and lighting costs with an annual assessment that was initially established in 1984. The City also has formed new assessment districts or zones of benefit to provide funding for landscaping and lighting improvements and services within specific neighborhoods or development areas in the City. Eleven of these assessment zones plus the citywide landscaping and lighting assessment district currently do not provide sufficient revenues to fully cover the total costs of improvements and services. These 12 deficit assessments also do not incorporate authorized annual assessment increases to account for inflation, so their deficits continue to grow annually, placing additional strain on the City general fund.

We understand that the City desires to create ongoing new revenue sources to offset the general fund contributions to the 12 deficit assessments, and perhaps to fund other improvements. We understand that new or increased benefit assessments are the most likely funding mechanism for the deficit assessments.

SCI Consulting Group understands the issues and objectives of the City. We also are very familiar with agency-wide new benefit assessments or parcel taxes for landscaping and lighting services. Gaining property owner approval for new or continued benefit assessments is no easy matter. In fact, as previously noted our research has found that most new assessments proposed by other firms for lighting or landscaping have failed. In comparison, SCI has a 95% win rate. Our unmatched track record is one important measure that clearly sets SCI above and apart from other firms. ***(It should be noted that many other firms evidently claim to have a similarly high success rate with assessments. However, their win rates are based on new development area assessments which are nearly certain to be successful, instead of developed area assessments that must receive approval from high numbers of individual property owners.)***

Our proposed scope of services will commence with a detailed and comprehensive analysis of the area served by each deficit assessment, including parcels by type and location, property ownership, property attributes, landscaping and lighting service and improvement needs and other factors that may influence the proposed new funding measures. Next, we will utilize our extensive assessment engineering expertise to develop initial models of the potential new assessments that meet all legal requirements, including the vital special and general benefit factors that form the foundation of every benefit assessment. ***(We anticipate proposing new overlay assessments so that the valuable grandfathered status of the City's existing assessment districts and zones is not jeopardized.)***

After the potential/preliminary lighting and landscaping assessment methodology and ballot measure strategic plans have been reviewed and confirmed by the City and legal counsel, we would implement twelve unique and separate surveys to affected property owners in each deficit assessment district/zone. Our survey will be designed to integrate the specific potential new or increased assessments and weighted ballot "votes" for each property owner into the survey and opinion research. This will ensure that each property owner surveyed is asked to respond to the specific amount of proposed new assessments for his property and is not surveyed based on some average rate that may have no relation to the specific assessment amount for his property.

After the twelve surveys are completed, we will analyze the findings and develop the strategic recommendations for assessment ballot proceedings to garner property owner approval for new benefit assessments in each of the 12 deficit assessment areas. Next the survey findings and recommendations will be presented and reviewed with the City. **At this important decision point, the City Council will have the opportunity to finally decide on whether to proceed with assessment ballot proceedings for some or all of the deficit assessments, what rates to propose and when to conduct the ballot proceedings.**

This phased approach and integration of an initial benefit assessment rate analysis our highly specialized opinion research designed specifically for benefit assessments, which has been pioneered and used exclusively by our firm for over ten years, will provide the City with **highly accurate survey findings for each deficit assessment** and the advantage of reduced upfront costs of determining the feasibility of proceeding with new assessment within each deficit assessment area prior to investing in a full assessment engineering project.

If the City elects to proceed with assessment ballot proceedings for the deficit assessment areas, we will prepare a detailed Engineer's Report for each of the new assessments. ***(We anticipate proposing new assessment districts for each deficit assessment area instead of zones within one assessment district because separate assessment district gain the advantage of improved legal defensibility.)*** The Engineer's Reports will be carefully crafted by our highly experienced senior professional assessment engineer, John Bliss, M. Eng., P.E.

In conjunction with the assessment engineering and balloting phases, we will assist the City with educational outreach services designed to ensure that property owners and voters in each deficit assessment area are fully informed about their ballot measure prior to the balloting. We have consistently found that the most effective outreach approach is residents talking to their neighbors about the reasons to support the proposed assessment for their area and the benefits they will receive by voting yes. Therefore, a center focus of our outreach approach will be identifying and activating local volunteers to carry the outreach and messaging approaches. **It should be noted that this approach is very similar to the outreach approach SCI**

effectively used for the successful citywide Park and Recreation assessments in the City of Moorpark.

Next, we will manage the twelve assessment ballot proceedings, including designing, preparing and mailing unique and separate notice and ballots for each deficit assessment, administering the assessment ballot procedures, responding to property owner questions and inquiries, organizing the public hearing at the conclusion of the balloting period and ensuring the assessment ballot tabulation is performed in a fully transparent and accountable manner.

It is also important to note that throughout the entire project, from the initial phase through the balloting and post-election tasks, we will coordinate our services very closely with City staff, legal counsel, volunteers, stakeholders and other project team members.

QUALIFICATIONS, CAPABILITIES AND EXPERTISE

ABOUT SCI CONSULTING GROUP

SCI Consulting Group is a public finance and urban economic consulting firm with 25 years of expertise in assisting public agencies in California with planning, justifying and successfully establishing new revenues for their service and capital improvement needs and objectives – and managing special levies.

SCI possesses extensive benefit assessment engineering and formation expertise, particularly for agency-wide assessments that are much more difficult to gain property owner approval than development project or neighborhood assessments. Since Proposition 218 was approved in 1996, we have successfully formed 99 agency-wide new benefit assessments, **which represent the majority of all post-218 new agency-wide assessments in the State**. These successful agency-wide assessments include all of the largest successful assessments in the State as well. Moreover, we have successfully formed **30 new agency-wide assessments** and parcel taxes after Proposition 218 for landscaping and lighting and over **300 neighborhood area assessments** for landscaping and lighting.

SCI provides year-round special tax and assessment administration services and planning services for clients throughout California. Our firm currently administers over 400 assessment and special tax districts, comprising over 10,000,000 parcels. SCI's planning projects have included hundreds of development impact studies, facility and financing plans, demographic studies, cost of service and fee justification studies, and other planning and real estate studies.

SCI also offers extensive expertise with the important legal and procedural issues involving benefit assessments, special taxes and fees. The principals at SCI are acknowledged experts on these public financing mechanisms and were involved with the cleanup legislation for Proposition 218. In addition, our firm is a frequent presenter and columnist on assessment ballot proceedings for the American Public Works Association, Association of California Water Agencies, League of California Cities, California Special Districts Association, California Fire Chiefs Association, California Stormwater Quality Association, California Parks and Recreation Society, Mosquito and Vector Control Association of California, Institute for Local Self Government, California Association of Public Information Officers, Floodplain Management Association, Bay Area Open Space Coalition, California Conference of Directors of Environmental Health, Associations of Government and other organizations.

AGENCY-WIDE LANDSCAPING AND LIGHTING EXPERTISE

As noted, SCI has more experience with successful agency-wide new assessments than all other firms in the State, combined. We assisted the following agencies with successful agency-wide, post Proposition 218 assessment ballot proceedings for parks, landscaping and lighting:

- Arbuckle Recreation and Park District
- City of Colusa
- City of Lompoc
- City of Menlo Park
- City of Moorpark
- City of Palmdale
- City of Vacaville (30 Measures)
- Claremont Unified School District
- Conejo Recreation & Park District
- Cordova Recreation and Park District
- Cosumnes Community Services District
- County of Placer - Applegate Park
- County of Placer - Granite Bay
- County of Ventura
- County of San Joaquin
- Fair Oaks Recreation & Park District
- Feather River Recreation & Park District
- Fulton-El Camino Recreation and Park District
- Georgetown Divide Recreation and Park District
- Hayward Unified School District
- Jefferson Union High School District
- Mission Oaks Recreation & Park District
- Monterey Peninsula Regional Park District
- Mountains Recreation & Conservation Authority
- Pleasant Valley Recreation & Park District
- Rancho Simi Recreation & Park District
- Sequoia Union High School District
- Sunrise Recreation & Park District

REVENUE MEASURE FEASIBILITY AND SURVEY EXPERTISE

Another important capability that sets SCI apart from other firms is our unique and unmatched approach for the initial feasibility analysis and opinion research phase that

should precede any final decision by an agency to proceed with an assessment ballot measure. In order for an opinion research and survey project to provide accurate findings and actionable recommendations, it is vital that the research methodology is specifically tailored to the many unique aspects of the funding measure(s) under consideration.

For example, SCI has developed a sophisticated research methodology for identifying the relative advantages and tradeoffs for different funding mechanisms such as bonds, special taxes, benefit assessments and CFD taxes. Our research methodology, which has been proven on over 100 surveys for benefit assessments, also accurately incorporates an initial assessment approach and the specific weighted ballot/assessments into the survey. Moreover, we have consistently found that the traditional phone and mail survey methods used by other firms generate highly inaccurate predictions for benefit assessments. If desired, we would be happy to provide comparative information demonstrating the highly predictive results from our opinion research approach.

ASSESSMENT, FEE AND PROPOSITION 218 EXPERTISE

As noted, SCI has significantly more expertise with successful agency-wide Proposition 218 benefit assessments and fees than all other firms in the State, combined.¹ Through the process of designing and establishing so many post-Proposition 218 benefit assessments we have worked with most of the leading Proposition 218 specialized attorneys in the State and have gained extensive legal and Proposition 218 compliance expertise. Moreover, John Bliss, our senior assessment engineer has more experience with successful post-Proposition 218 landscaping and lighting assessment districts than any other engineer.

SERVICES

Following is a summary of SCI's services:

- **Ballot Measures**
 - Assessment District Formation
 - Property Related Fees Formation
 - Mello-Roos Community Facilities District Formation
 - Special Levy Administration Services
- **Opinion Research and Revenue Measure Feasibility Analysis**
- **Public Finance Programs and Alternatives**

¹ It should be noted that other firms may list the number of assessments they have attempted, not the number that were successful. Moreover, we advise against including development area or neighborhood area assessments when comparing track records because such assessments are very easy to successfully form.

- LAFCo Annexations and New District Formations
- Compliance with Proposition 218
- Continuing Disclosure & Dissemination Services
- Administrative Systems and Custom Software Solutions
- Parcel Audits and Tax Base Certification
- **Planning Services**
 - Facilities Master Plans
 - Developer Fee Studies
 - School Fee Facility Plans
 - School Facility Needs Analysis
 - Developer Negotiations and Full Mitigation Fees
 - Attendance Boundary Studies
 - Demographic Studies
 - Quimby and Impact Fees
 - Cost of Service Analysis and Fee Justification

For more information, please visit www.sci-cg.com

RELEVANT PROJECT EXPERIENCE AND REFERENCES

Cosumnes Community Services District

8820 Elk Grove Blvd., Suite #1

Elk Grove, CA 95624

(916) 405-7166

Contact: Jeff Ramos, General Manager

Email: jefframos@yourcsd.com

In 1996, SCI assisted the District with several successful assessment ballot proceedings for new, increased and continued benefit assessments. Between 1996 and 2003, SCI provided full service assessment administration services for the District. In 2004, the District went out to bid for the levy administration work and the District board decided to select the low bidder for the assessment administration services. (SCI's fee was slightly higher.)

This other firm handled the assessment administration between 2004 and 2007. In 2008 the District contacted SCI because they were uncertain whether the assessment calculations from the other firm were being accurately determined for all parcels in each zone within the assessment district and whether the other firm was expending sufficient time to fully research all parcels and assessments. SCI performed a review of the assessment calculations and found numerous under calculated assessments and missing parcels that should be subject to the assessments. The District subsequently re-hired SCI to administer the assessments. In SCI's first year of administering the assessments again, we identified many parcels that were incorrectly assessed and over \$93,000 of additional annual assessment revenues for the District. (See the recovered revenues section for additional information)

SCI also significantly upgraded the Engineer's Report to more fully comply with Proposition 218, current legal requirements and recent court decisions. The previous assessment administration firm had not made any upgrades to the Engineer's Report and had essentially provided a nearly identical copy of the Engineer's Report SCI originally created for the assessments.

SCI is also currently assisting the District with several new assessment districts in developed areas to raise additional revenues for parks and landscaping improvements and services. Four new assessment districts for developed areas have already been successfully approved and formed over the last two years and another is currently underway.

City of Palmdale

38250 Sierra Highway

Palmdale CA 93550

(661) 266-0115

Contact: Mike Mischel P.E. P.L.S., Director of Public Works**Email:** MMischel@cityofpalmdale.org

Initially, SCI assisted the City with a revenue measure feasibility analysis and opinion research project to measure the level of local support for a benefit assessment or special tax for parks and recreation facility improvements. This survey found good support, but not enough support at the rate required to fund all of the City's objectives. The City decided not to proceed at that time with a ballot measure at the rate that was currently supported and with only some of the improvements the City was seeking. Instead SCI worked with the City on a year long educational outreach effort to raise awareness of the City's "Vision for the Future". After this educational outreach effort, SCI conducted another tracking survey which found that support had indeed increased due to the outreach and was now sufficient at the rate of assessment needed to fund all of the improvements.

The City subsequently hired SCI to assist the City with a city-wide landscaping and lighting assessment district formation and ballot proceeding. The ballot proceeding was highly successful. It generated the needed funding for a regional soccer complex, two swim centers, a destination family aquatics resort, park improvements, a performance amphitheater and improvements to all local parks.

Since 2002, SCI has handled the assessment administration, has prepared the annual Engineer's Report for this assessment and has made the annual assessment engineering findings for the successful continued collection of this benefit assessment.

In 2006, SCI successfully increased the assessment rates in one zone in an existing assessment district. In 2009, SCI also took over the administration of a sewer fee that was previously administered by the County. In the first year alone, SCI uncovered over \$152,000 in additional annual revenues due to previously incorrect special levy calculations and parcels that were missed but should have been subject to the sewer fee. And in 2010, SCI took over the administration of other City assessments previously handled by another engineering firm.

City of Folsom

50 Natoma St.

Folsom, CA 95630

(916) 355-7207 Ext:220-3017

Contact: Lorraine Poggione, Landscaping and Lighting District Manager**Email:** lpoggione@folsom.ca.us

SCI was initially hired in 2003 to administer 19 existing landscaping and lighting assessments in the City. These assessments had previously been administered in-house. In the first year of our administration, we uncovered over \$24,000 in additional annual revenues due to previous under-assessments on certain parcels. In addition, we performed a comprehensive Proposition 218 compliance analysis that resulted in significant upgrades to the assessment engineering findings and general/special benefit analysis required under Proposition 218.

SCI has served as the City's Engineer of Record and assessment administrator for eight years. During this time period, we have also assisted the City with many assessment ballot proceedings to increase existing assessment rates, or to establish new assessment districts. In addition, we assisted the City with a comprehensive analysis of the expenditure and future capital improvement reserve needs for all 25 assessment districts in the City.

Mission Oaks Recreation and Park District

3344 Mission Avenue
Carmichael, CA 95608
(916) 488-7276 Ext:3011

Contact: Debby Walker, General Manager

Email: dwalker@morpd.com

In 1998, SCI conducted opinion research for a new benefit assessment for parks and recreation improvements. Based on the optimistic finding from the survey, SCI subsequently conducted a successful benefit assessment ballot proceeding to fund park maintenance and improvements. This assessment was approved at the rate of \$27 per home for a term of 10 years.

In 2005, SCI conducted a survey to measure the feasibility of increasing the rate of assessment and eliminating the sunset provision. This survey found support for both features. In the spring of 2006, SCI concluded a successful assessment ballot proceeding that increased the rate of assessment to \$39 per home, added an annual CPI increase and eliminated the sunset date. In addition, SCI is currently assisting the District with the establishment of Park Development Impact Fees, over and above Quimby Fees.

PROJECT TEAM AND KEY PERSONNEL

SCI will use a team approach for this project and will work closely and collaboratively with the City and other key stakeholders. Such a collaborative, team based approach helps to assure that all parties and stakeholders will work additively together to develop and implement an effective and winning game plan.

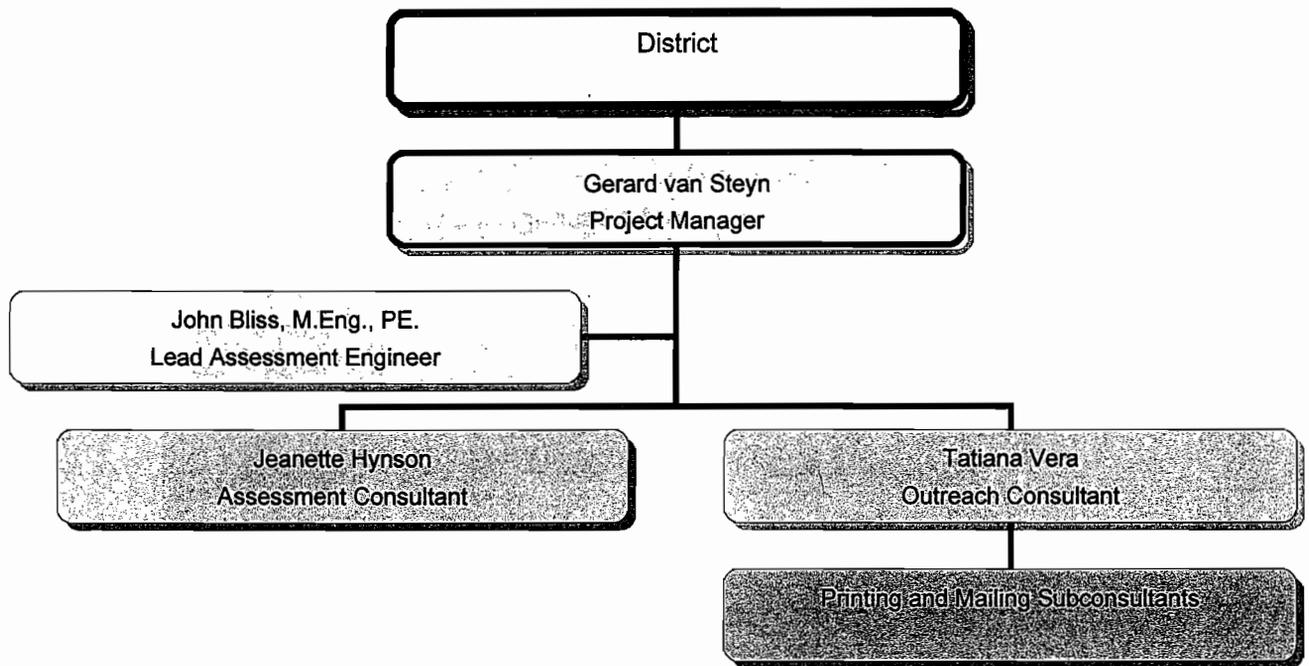
Important components of our approach that have been the foundation of our proven success record with other, similar ballot measures are as follows:

- 1. To use extremely qualified and experienced personnel.**
- 2. To establish and maintain a collaborative team based approach and optimal working relationships with the City, legal counsel, other project team outreach consultants and stakeholders.**
- 3. To develop a complete and accurate understanding of the City, the City's objectives and needs with regard to its landscaping and lighting needs and the profile and demographics of property owners, voters and the region.**
- 4. To obtain accurate research that is truly reflective of the desires and priorities of property owners and voters in each deficit assessment area.**
- 5. To develop a ballot measure that best meets the needs and objectives of the City and the desires and priorities of property owners and voters.**
- 6. To develop assessment engineering findings and reports that meet all legal requirements.**
- 7. To accurately, transparently, efficiently and correctly conduct the assessment ballot proceedings.**
- 8. To accurately, efficiently and correctly submit and administer the new benefit assessment levies so they are collected efficiently, accurately and without problems or negative public reaction.**
- 9. Most importantly, to deliver successful outcomes, and satisfied clients.**

It takes extremely qualified people to accomplish these high standards and objectives. SCI is proud of our personnel and invites the City to contact any of our clients to verify the level of service we provide, the capabilities of our staff and the results we deliver.

If selected for this project, Gerard van Steyn would serve as the project manager. John Bliss, P.E., M. Eng., Vice President of our firm would serve as the lead assessment engineer. Jeanette Hynson, an assessment balloting and opinion research consultant with significant landscaping and lighting funding experience will lead the assessment balloting and survey services. The other team members for this project would include Tatiana Vera, Outreach Consultant, who will work with Gerard and Jeanette on educational outreach. An organizational chart is presented below, and resumes follow.

ORGANIZATION CHART



GERARD VAN STEYN, M.B.A., PRESIDENT

Gerard van Steyn, with advanced degrees in finance and real estate, specializes in assisting public agencies with research, planning, and revenue measure services and is a recognized expert on benefit assessments, property related fees, special taxes and other public financing mechanisms. Over the last 20 years, Mr. van Steyn has worked on a wide range of successful revenue enhancement projects for public agencies

throughout California. These projects include over 50 feasibility analysis, financing and research projects. In addition, over the last twelve years since Proposition 218 was approved, Mr. van Steyn has served as the lead manager for over 30 community-wide benefit assessment and special tax ballot measures, all but one of which have culminated in a successful ballot outcome. Mr. van Steyn has also formed many Mello-Roos Community Facilities Districts (CFDs) and has extensive expertise with the post formation financing activities and reapportionment requirements for CFDs.

Mr. van Steyn has specialized expertise and training in opinion research and statistical analysis. He has developed the new, innovative and industry leading survey methodology that accurately accounts for the many important differences between a voter decided tax and a property owner decided benefit assessment. SCI has found that this opinion research methodology offers unmatched accuracy for predicting the outcomes for both funding mechanisms.

With over two decades of hands-on experience, Mr. van Steyn also has extensive expertise with levy administration services. He has led many levy administration projects for SCI and has developed and refined SCI's levy administration procedures and approaches over this tenure. In addition, Mr. van Steyn has extensive planning and consulting expertise. His projects include over 75 development impact fee nexus studies, demographic studies, tax base and financing plans and local funding feasibility plans for local agencies throughout California.

Following is a partial listing of Gerard's successful assessment formation projects:

City of Lompoc	Aquatics Center Assessment
City of Menlo Park	Sidewalks & Trees Assessment
City of Moorpark	Park Maintenance Assessment
City of Vacaville	50+ New Landscaping and Lighting Assessments
Conejo Recreation & Park District	Parks & Open Space Assessment
Cosumnes Community Services District	10+ New Landscaping and Lighting Asmts
Fair Oaks Rec. & Park District	Parks and Recreation Assessment
Feather River Rec. & Park District	Parks and Recreation Assessment
Fulton-El Camino RPD	Parks and Recreation Assessment
Hayward Unified School District	Landscaping Assessment
Mission Oaks Rec. & Park District	Park Improvement Assessment
Monterey Peninsula Regional Park District	Parks & Open Space Assessment
Santa Monica Mountains Conservancy	Open Space/Fire Assessment
Napa County Mosquito Abatement District	Vector Control Assessment
Orange County Vector Control District	Vector Control Assessment
Placer Mosquito Abatement District	Vector Control Assessment
Rancho Simi Rec. & Park District	Parks & Open Space Assessment
San Benito Vector Control Program	Vector Control Assessment

San Joaquin County Mosquito & Vector Control Dist.	Vector Control Assessment
Sequoia Union High School District	Landscaping Assessment
Sunrise Rec. & Park District	Rec. Facilities Assessment

Mr. van Steyn graduated from the University of California at Davis with highest honors in Managerial Economics and received a Master of Business Administration in Finance and Real Estate from the Haas School of Business, University of California at Berkeley. Gerard also is a licensed Real Estate Broker with the State of California.

JOHN BLISS, M.ENG., P.E., VICE PRESIDENT

John Bliss, a professional engineer and Vice President of SCI, specializes in assessment engineering, special and general benefit analysis, crafting legally compliant, robust Engineer's Reports, assessment administration, cost estimating and budgeting, database design and implementation, regulatory compliance, and revenue measure formations. He has 15 years of experience in this field of expertise. Moreover, John is a recognized expert assessment engineer and Proposition 218 compliance specialist who has served as an expert witness and technical authority. He also has worked with most of the leading Proposition 218 specialized attorneys in the State, which has further expanded his professional and technical expertise.

During his tenure at SCI, Mr. Bliss has served as the responsible Assessment Engineer on over 300 Engineer's Reports for new or increased assessments – comprising more post-Proposition 218 new assessment engineering than any other assessment engineer in the State.

Mr. Bliss also has extensive programming and database expertise. He has been the instructor of "Database Design for Project Management" at UC Berkeley Extension. John has materially contributed to the specialized and proprietary computer and database programs we utilize as part of our assessment administration procedures. Prior to joining SCI, Mr. Bliss co-founded several information technology companies that focused on database and infrastructure management including ConstructionPrice, and US Components, and worked as field construction engineer for Shimmick Construction Company and the U.S. Department of Transportation.

Mr. Bliss's assessment formation projects include:

City of Berkeley	Utility Undergrounding Assessment
City of Moorpark	Park and Landscaping Asmts
City of Pinole	Water/Wastewater Charge
City of San Carlos	Flood Control Assessment
City of San Diego	Business Improvement Asmts
City of San Mateo	Flood Control Assessment

City of Santa Barbara	Fire Prevention Assessment
City of Vacaville	Park and Recreation Assessments
Cordova Recreation and Park District	Park and Recreation Assessment
Cosumnes Community Services District	Park and Recreation Assessments
County of Alameda	Vector Control Assessment
County of San Diego	Vector Control Assessment
County of Ventura	Vector Control Assessment
El Dorado Hills Community Services District	Parks & Landscaping Assessments
El Medio Fire Protection District	Fire Protection Parcel Tax
Loomis Fire Protection District	Fire Suppression Assessment
Mission Oaks Recreation and Park District	Park and Recreation Assessment
Mosquito & Vector Mgmt District of Santa Barbara Co.	Vector Control Assessment
Reclamation District 10	Flood Control Assessment
Shasta Lake Fire Protection District	Fire and Apparatus Assessment
Tehama County Mosquito & Vector Control District	Vector Control Assessment
Three Rivers Levee Improvement Authority	Flood Control and Water Asmt
Williams Fire Protection Authority	Fire Suppression Assessment

Mr. Bliss graduated from Brown University with a Bachelor of Science Degree in Engineering, and holds a Master's Degree in Civil Engineering from The University of California, Berkeley, where he was a Regent's Scholar. He is a licensed professional Civil Engineer in the State of California and is a LEED accredited professional.

JEANETTE HYNSON, ASSESSMENT AND SURVEY CONSULTANT

Jeanette Hynson, a special district formation, administration and opinion research specialist, contributes over ten years of experience in levy administration, Proposition 218 assessment district formation and consulting services to the SCI team. Mrs. Hynson has expertise with impact fee justification studies, the creation and administration of benefit assessments and fees, public opinion research projects, meeting facilitation and other consulting services. In addition, Mrs. Hynson has extensive media and educational outreach experience.

Mrs. Hynson's recent projects include many new landscaping and lighting assessment districts for the City of Vacaville and the El Dorado Hills Community Services District.

Mrs. Hynson's benefit assessment formation projects include:

City of Moorpark	Flood Control Assessment
City of San Mateo	Flood Control Assessment
City of Vacaville	Over 50 New Landscaping Assessments
El Dorado Hills Community Services Dist.	Many New Landscaping Assessments
Fresno Vector Control District	Vector Control Assessment
Wheatland Fire Authority	Fire Suppression Assessment

Mrs. Hynson is a certified database and computer information systems expert.

TATIANA VERA, ASSESSMENT AND OUTREACH CONSULTANT

Tatiana Vera, a special district and assessment formation and outreach specialist, brings extensive assessment administration and assessment formation experience to the SCI project team. Tatiana also has expertise with financial modeling and cost analysis, impact fee justification studies, public opinion research projects and consulting services for public agencies. Moreover, Ms. Vera has significant experience with opinion research, benefit assessments, impact fees and other funding measures for landscaping and lighting, including several recently successful new landscaping and lighting assessments with relatively high annual assessment rates.

Ms. Vera's recent projects include multiple successful new landscaping and lighting assessments for Cosumnes Community Services District, including some with landscaping rates over \$200 per year. Tatiana also assisted with the recent establishment of new development impact fees for the Georgetown Divide Recreation and Park District.

Mrs. Vera's benefit assessment projects include:

Cosumnes Community Services District	Parks and Recreation Asmts (3)
Georgetown Divide Rec and Park District	Parks and Recreation Assessment
Owens Valley Mosquito Abatement Program	Vector Control Assessment
Penn Valley Fire Protection District	Fire Suppression Parcel Tax
Wheatland Fire Authority	Fire Suppression Assessment

Ms. Vera graduated from the Sonoma State University with a Bachelor of Arts in Economics.

INTERACTION, INVOLVEMENT, AND COMMITMENTS

The team members will interact in a collaborative and iterative manner, with Mr. Bliss overseeing the entire process from start to finish. Moreover, if this proposal is accepted, SCI will not assign other projects to them which would interfere with our ability to successfully perform the Work Plan and related tasks for this project. Perhaps most importantly, the identified project team will perform the work for the City and will not be revised. The project team leaders will also be materially and directly involved in this project.

We can make this commitment because we are a relatively small firm highly focused on benefit assessment formations. (The department heads at larger firms tend to have so many other responsibilities that their ability to participate on project work scopes is very limited.) Moreover, none of the proposed team members have any work commitments that would interfere with their ability to successfully complete this project. We sincerely invite you to contact any of our clients who can attest that the

project team members identified in our proposal are the same individuals who actually perform the work scope.

SUBCONSULTANTS

SCI would use its highly experienced subconsultants, Admail West and Eagle Press, for the printing and mailing of the notices and assessment ballots. These firms have accurately and appropriately handled the printing and mailing of over 5 million assessment ballots for SCI. Moreover, they also handle official election mail for several County Elections departments. At the option of the City, SCI could hire an independent accounting and auditing firm to perform the ballot tabulation services. The tabulation firm would be a local business enterprise. However, this proposal assumes that the clerk of the Council will handle the ballot tabulation, with assistance provided by SCI.

TECHNICAL APPROACH

PROPOSED SERVICES AND APPROACH

Our proposed approach to the project is segmented into unique tasks outlined as follows. **We have designed this generally phased and sequenced work plan to provide the City with critical information during the project – information that can be used by the City to best evaluate how and if to proceed with subsequent work phases.**

PHASE IA – KICKOFF MEETING, INITIAL ANALYSIS, ASSESSMENT ENGINEERING AND PLANNING

Our approach for Phase IA services will begin with a kickoff meeting. At this meeting, a project timeline and overall approach will be developed. Additional recommended services may be discussed and incorporated as well.

After the initial meeting and project understanding is developed, SCI will perform a comprehensive analysis of the City's current and desired landscaping and lighting funding and improvements. In addition, we will collect, compile and analyze property ownership, voter statistics, tax base, demographic and political profiles in each of the deficit assessments. SCI will also analyze various community factors that may affect the proposed assessments, such as other local, political and socioeconomic issues and other funding measures. We perform these services by first utilizing SCI's internal and comprehensive historical parcel data for all parcels in the City. This internal property, parcel and ownership data will be supplemented with additional data from the City, the county assessor, the registrar of voters, planning agencies and other landscaping and lighting information sources. After this extensive data has been compiled, we will analyze it in context with the proposed services and improvements in each deficit assessment area, other community factors in the City, and the current services provided by the City. This detailed research and analysis will provide SCI with a solid understanding of the factors that will be used as the foundation for designing and evaluating the desired funding measures.

After a comprehensive review of the scenarios and the potential services and improvements that would be provided in each deficit assessment area, SCI will develop preliminary benefit assessment methodologies for each parcel in each of the 12 deficit assessment areas.

After the initial benefit assessment methodology and rate scenario alternatives have been drafted, they will be reviewed with the City. City comments and suggestions will be incorporated as appropriate.

This initial project scope, cost analysis and initial benefit assessment engineering project will help to define the potential services, assessment rates, specific proposed assessment amounts by parcel and weighted ballot “votes” by property owner that will be tested in the subsequent survey phase. It will also allow the survey to reflect the actual weighted ballot amounts that ultimately also would be presented to property owners in the assessment ballot proceeding. This integration of the actual proposed assessment amounts, calculated based on the specific type and size of parcel is vital because it will ensure that the subsequent phase of opinion research accurately measures support from all types of property owners and based on the specific assessment they may be asked to support for their property, instead of an average rate that may have no relation to their proposed assessment.

Deliverables:

- **Initial kickoff meeting**
- **Analysis of property and ownership base**
- **Preliminary assessment spread and methodology**
- **Preliminary models of weighted ballot votes and participation by property owner type for each deficit assessment district**

PHASE IB – SURVEY AND OPINION RESEARCH

This survey and opinion research phase would provide the City with a highly accurate projection of the level of weighted ballot support for a new or increased benefit assessment in each of the 12 deficit assessment districts.

SCI has developed a sophisticated research methodology for identifying the priorities of voters or property owners and their support for a local funding measure and how best to package the measure for success. One of the primary strengths of the recommended approach is its proven ability to most accurately identify support for a property owner mailed ballot proceeding not only on an overall basis, but also from different types of property owners, such as single family residential, business, industrial, apartment, vacation property owners and investment property owners. Moreover, the recommended approach and methodology have proven to provide accurate and reliable research findings in a wide range of socio and economic environments such as rural areas, urban communities, ranges of income, and a variety of ethnic backgrounds.

The election environments, legal and logistical considerations, as well as the campaign opportunities for property owner mailed ballot proceedings, are quite different from registered voter elections for special taxes (such as bonds or parcel taxes) – so it is important that the research methodology take these differences into account in order to ensure reliable results. The methodology developed by SCI does exactly that, and it

has proven to be materially more accurate than phone surveys in predicting actual ballot results for benefit assessments.

In ballot measure and revenue measure research, the first step is to identify the population of individuals who will vote on the measure, then survey a representative sub-sample or all of these individuals. The appropriate set of individuals to be included in the sample varies depending on a number of factors. The type of voter is an important factor, as different types of voters will likely have different opinions about the proposed services, and may have different levels of proportional "vote" in a ballot proceeding.

For special tax revenue measures (e.g., parcel tax, general obligation bond, sales tax), all registered voters who are likely to participate in the election of interest represent the appropriate sampling universe. In a mailed ballot proceeding, however, all property owners are eligible to participate, instead of just registered voters. This participant "universe" includes apartment owners, commercial property owners, agricultural property owners and vacation property owners.

In special tax elections, each vote is weighted equally in determining the outcome. However, in assessment ballot proceedings, the higher the amount of a property owner's assessment correlates to the greater the weight of his or her vote in determining the outcome of the proceeding. Assessment ballot proceedings also employ different voting procedures, as all property owners, even those who do not reside within the proposed assessment district area, receive a mailed ballot and can participate.

Due to the demonstrated higher level of accuracy and improved ability to reach all types of property owners and voters, SCI recommends a mailed survey approach specifically tailored to account for the unique aspects of the potential benefit assessment, services and other specifics in each deficit assessment district. This recommended approach is one of the keys to ensuring that the City will receive accurate, reliable data and advice regarding property owner, voter and residents' priorities and support for local benefit assessment funding measures for landscaping and lighting improvements and services in each of the deficit assessment areas.

In summary, a unique informational item and survey will be developed for each deficit assessment area to survey for a proposed new or increased assessment for each area. The mailed surveys will also be designed in a manner that promotes a high percentage of response. For example, the mailed survey design utilized by SCI typically generates a response from approximately 20% to 25% of sampled property owners. By contrast, phone surveys and mail surveys utilized by other firms typically obtain responses from only 5% to 10% of voters.

In order to obtain statistically accurate measures of support from all of the main property/ownership categories, SCI recommends surveying 6,000 property owners in

the citywide Street Lighting and Landscaping District and nearly all property owners in the other 11 assessment zones with deficits. The proposed survey quantities are shown in the following table. It should be noted that our survey will provide accurate responses from all types of property owners, including single family, multi-family, business, vacant and industrial property owners. In addition, we would survey people who do not reside in the City, but who own property in the City. By surveying all types of property owners, our approach will offer much higher accuracy in predicting the weighted ballot outcome. (Phone surveys cannot effectively reach the owners of apartments, businesses, other non-residential properties and owners who reside outside of the City.)

Proposed Survey Quantities and Survey Response Size

	<i>Assessment District/Zone</i>	<i>Parcels</i>	<i>Survey Sample</i>	<i>Estimated Responses</i>
	Landscaping & Lighting	11,028	6,000	1,500
1	Tract 2851	88	88	22
2	Tract 2865	623	623	156
3	Tract 3032	269	269	67
4	Wm Ranch Rd	131	131	33
5	T-3019 & T-3525	217	217	54
6	Tract 3306	22	22	6
7	L A @ Gabbert	107	107	27
8	Buffer	725	725	181
9	Condor Dr.	13	13	3
10	Mt. Meadows	2,493	2,400	600
11	Tract 4174	9	9	2
Survey Totals			10,604	2,651

After the period allowed for the mailing and postage-paid return of the surveys, SCI will conduct a complex analysis and modeling of the survey results for the City as they relate to the expected property owner ballot participant profile and balloting scenario in each separate deficit zone. After completing this detailed modeling and analysis, SCI will prepare a comprehensive report that summarizes the opinion research findings and makes recommendations regarding residents' and owners' landscaping and lighting improvement and service priorities, as well as the feasibility of moving forward with ballot measures in each deficit assessment area to fund such priorities. The

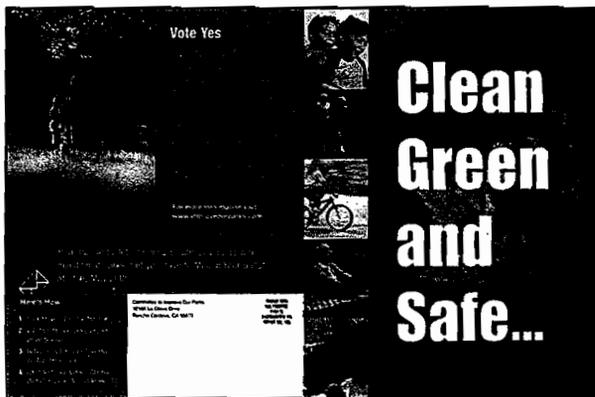
survey findings will determine whether it will be more advantageous to propose a benefit assessment or a parcel tax.

The report will also include additional value-added elements such as the recommended ballot measure alternatives and services to be funded, an outline of the recommended action plan for proceeding with local funding measures, profiles of likely supporters and opponents, service priorities, support by geographic area, and key messaging elements and strategies.

Deliverables:

- **12 unique, and individually designed mailed survey instruments, accompanying informational items, one set for each deficit assessment district, outgoing and postage-prepaid return envelope**
- **Surveys mailed to a randomized, stratified sample of at least 10,600 property owners**
- **A report of survey findings and recommendations for proceeding with a new or increased assessment in each of the 12 deficit assessment districts**
- **Profiles of likely supporters and opponents**
- **A summary of the most desired landscaping and lighting improvements and services by deficit assessment district**

PHASE IIA – EDUCATIONAL OUTREACH



Clear, concise and appropriate informational and educational outreach is one of the most important elements for a successful ballot outcome. If the community is adequately informed about the issues, and the messaging and approach are based upon extensive experience with other successful property owner and voter ballot measures, the City's proposed assessments

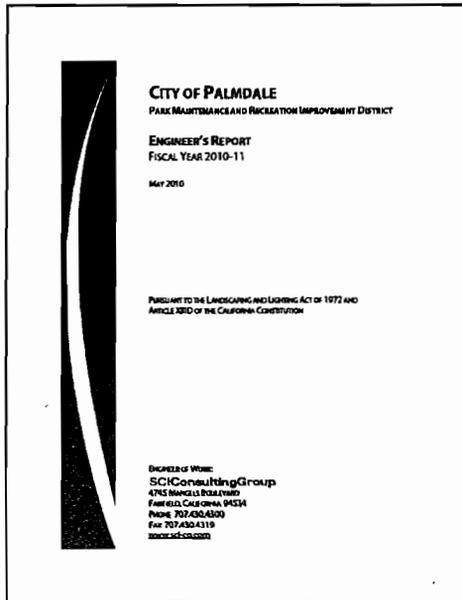
will have good prospects for a successful outcome. SCI's unparalleled track record of success is, in large part, due to our extensive expertise in this area.

As previously noted, we have consistently found that the most effective outreach approach is when local residents and volunteers contact their neighbors to explain the benefits of the proposal and encourage support. Many other outreach consultants overly rely on printed mailers and handouts. However, we have found that printed materials have minimal affect on ballot measure outcomes. Therefore, we anticipate using printed materials to support a true "boots on ground" outreach approach.

In summary, SCI shall assist with public informational and educational outreach strategies and property owner informational services. Our firm's informational outreach efforts, which will continue up to and throughout the balloting phase, include tasks necessary to ensure that the property owners in each deficit assessment district are adequately informed about the assessment ballot proceeding and the proposed services/improvements in their area prior to the mailing of ballots. Throughout this process, SCI will work closely with volunteers, City staff and other interested parties.

Deliverables:

- **Educational outreach plan and suggested approaches**
- **Assistance with educating and engaging stakeholders and local volunteers**
- **Informational, FAQ and other documents**
- **Website information**
- **Assistance with public workshops, as appropriate**



PHASE IIB – ENGINEER’S REPORTS AND ASSESSMENT ENGINEERING

After the survey results have been presented to the City, and if the City elects to proceed with assessment ballot proceeding for new or increased assessments for all or some of the 12 deficit assessments, SCI will commence Phase IIB work. In this Phase, SCI would complete a comprehensive benefit assessment engineering project for the proposed landscaping and lighting improvements and services to be funded in each assessment district. SCI will begin this Phase by also integrating our findings from the previous work Phases into the assessment engineering analysis.

Next, SCI will review existing programs and services and develop a listing of prioritized improvements and services by deficit district to best meet the goals and priorities of the City and the priorities and desires of the district area, as determined by the surveys. SCI will work closely with the City and other parties to develop multi-year revenue and expense proformas which will include estimated revenues from the assessments and other sources. This multi-year budget and capital improvement plan will also serve as an important basis for the budgets and cost estimates provided within the Engineer’s Report and the ballot measure features which will ultimately be presented to property owners.

In conjunction with the budget and financial planning services, SCI will continue, expand and finalize the benefit assessment engineering project that we began in Phase I. This comprehensive assessment engineering work will include defining the special and any general benefits from the proposed improvements and services. For this important work, SCI will use its industry leading benefit assessment engineering and landscaping and lighting expertise to develop a benefit assessment methodology that fully complies with the legal and procedural requirements for a new, post-Proposition 218 benefit assessment, including the court's direction in Silicon Valley Taxpayers Association v. Santa Clara County Open Space Authority, Dahms v. City of Pomona, Greene v. Marin County Flood Control and Water Conservation District and Robert Beutz v. County of Riverside and other Proposition 218 decisions.

We will present these fiscal plans, our data review and analysis, and the proposed assessment methodology, levies and budgets to the City in a review session. Issues uncovered by the review will be highlighted and remedies suggested. After the City and City legal counsel have reviewed the data and information, we will prepare an Engineer's Report that fully meets the requirements of Articles XIII C and XIII D of the California Constitution (Proposition 218), the Government Code and other relevant code sections. The Engineer's Report, which will be prepared and signed by John Bliss, PE, an assessment engineer with extensive benefit assessment engineering experience for landscaping and lighting assessments, will include a detailed description of the landscaping and lighting improvements and services to be funded by the proposed assessments, plans for the improvements and services, future capital and facility improvement needs, a detailed cost estimate, an analysis of special and general benefits, the rationale used for the assessment apportionment, the method of assessment apportionment, calculation of the specific proposed assessment amount for each parcel in the City, an assessment diagram, and other elements.

After the Engineer's Report has been prepared, it will be reviewed with City staff and, if necessary, shall be revised to reflect any relevant comments or issues identified. SCI shall also finalize the assessment levies, assessment roll, assessment diagrams, and other information for preliminary City approval.

SCI shall prepare draft resolutions, notices and other materials and documents required or recommended for the proposed assessments. Such documents shall be finalized in conjunction with City legal counsel.

At the culmination of the Phase IIB services, SCI shall present the findings, proposed assessment levies and Engineer's Report to the City.

Deliverables:

- **Assessment Cost Estimate and budget**
- **Final assessment spread and methodology**
- **Preliminary Engineer's Report**
- **Final Engineer's Report**

PHASE IIC – ASSESSMENT BALLOT PROCEEDING

If the City approves the proposed Engineer's Report, budgets and assessments, SCI will commence Phase IIC services. Services under this Phase would include designing,

printing, addressing and mailing of the notice and assessment ballots to all property owners in the City.

The image shows a sample of an official notice and ballot information guide. It features a central title: "OFFICIAL NOTICE AND BALLOT INFORMATION GUIDE for the Proposed PARK MAINTENANCE AND RECREATION IMPROVEMENT DISTRICT for the Cordova Recreation & Park District". To the left, there is a photograph of a park with people, captioned "Ballot Measures for Improving the Maintenance of Parks and Recreation Facilities in the Cordova Recreation & Park District". Below the photo is a box titled "Additional Information" which provides contact details for the Cordova Recreation and Park District, including a phone number (916) 322-1941 ext. 24 and a website (www.cordovapark.com). At the bottom right of the notice is the logo for Cordova Recreation & Park District, which includes a stylized tree and the text "Cordova Recreation & Park District".

The design of the official notice and assessment ballot and supporting informational items and mailers is one of the most important elements of a successful ballot outcome. SCI will utilize its unmatched expertise and track record to design a

notice and ballot and informational items that clearly and concisely explain the reason for the landscaping and lighting assessment and that meet all legal requirements.

After the draft notice and ballot are prepared, they will be provided to the City and its legal counsel for review and comment. Feedback and comments will be incorporated before the documents are finalized.

After the notice and ballot are finalized, SCI will oversee the printing and addressing of the ballots. This work will be performed by subconsultants Eagle Press and Admail West, printing and mailing firms with industry leading experience with Registered Voter elections and assessment ballot proceedings. After the notices and ballots are printed and addressed, they will be mailed, pursuant to the California Constitution and the Government Code, to all property owners in the City with a proposed assessment.

Throughout the balloting, SCI will also field and respond to property owner inquiries, will research and confirm new owners that are not reflected on the official county property ownership records and will issue replacement ballots. SCI shall also prepare resolutions, documents and information for the public hearing and will assist the City and its legal counsel with responding to property owner testimony at the public hearing.

Deliverables:

- **Design of the draft assessment ballot, assessment notice, envelopes and other documents**
- **Final assessment ballot, assessment notice and assessment envelopes**
- **Resolutions for the assessment ballot proceeding**
- **Printing and mailing of the assessment ballots and notices, including postage-prepaid return envelopes**
- **Response to property owner inquiries prior to and during the assessment ballot proceeding**
- **Issuance of replacement ballots, proportional ballots and other ballot services, as necessary**

PHASE IID – BALLOT TABULATION

Pursuant to SB1477, which stipulates that the assessment ballot tabulation shall be performed by a party without a financial stake in the outcome, SCI highly recommends that the Clerk of the Council or an independent, professional accounting and auditing firm tabulate and certify the ballot results. (SCI highly advises against the assessment engineer performing the tabulation, because we have found that opponents often effectively erode support for a measure by claiming that the assessment engineer is not impartial enough to be directly involved with the tabulation because they may have opportunity for receiving additional compensation if the measure is successful. Moreover legislation has been proposed that would impose additional restrictions if the ballot tabulation is performed by the assessment engineer or any other party that participated in the design, research or public education of the assessment.)

As previously noted, this proposal assumes that the Clerk of the Council will be responsible for the ballot tabulation. Under this structure, SCI will provide technical and procedural assistance. SCI will also provide assistance in developing procedures and accountability provisions that ensure the highest level of transparency, independent oversight and accountability.

Deliverables:

- **Ballot tabulation and accountability procedures**
- **Overview of the tabulation services**
- **Assistance with establishing independent oversight by a neutral party**
- **If desired, tabulation of the ballots by an independent, professional accounting and auditing firm**

SCHEDULE OF FEES

In consideration for the work accomplished, as outlined in this proposal, SCI shall be compensated as detailed below. Each Phase is proposed as a fixed fee amount.

PHASE IA

In consideration for the work accomplished on this Project related to the Initial Analysis, Assessment Engineering and Planning, SCI shall be compensated in the amount of ~~\$6,500~~ payable 45 days after acceptance of an agreement for services.

PHASE IB

Compensation for work accomplished on this Project related to the preparation and administration of up to 12 unique surveys and opinion research projects to a randomized and stratified sample of up to 10,600 property owners and voters, as summarized in the following table, and the other revenue measure consulting services described in this proposal is ~~\$29,500~~ as a fixed fee amount, payable 50% upon finalization of the survey instruments and 50% upon finalization of the Survey Report.

Phase IB - Survey Sample Sizes

Assessment District/Zone	Parcels	Survey Sample	Estimated Responses
Landscaping & Lighting	11,028	6,000	1,500
1 Tract 2851	88	88	22
2 Tract 2865	623	623	156
3 Tract 3032	269	269	67
4 Wm Ranch Rd	131	131	33
5 T-3019 & T-3525	217	217	54
6 Tract 3306	22	22	6
7 L A @ Gabbert	107	107	27
8 Buffer	725	725	181
9 Condor Dr.	13	13	3
10 Mt. Meadows	2,493	2,400	600
11 Tract 4174	9	9	2
Survey Totals		10,604	2,651

PHASE IIA

Compensation for work accomplished on this Project under Phase IIA informational outreach, services shall be based on the extent of services provided, and the number of new assessment districts the City proposes to establish. Typically, the recommended outreach scope and approach is based on the survey findings. The estimated budget range for these services is ~~\$5,000 to \$15,000~~.

PHASES IIB, IIC and IID

As previously noted, SCI highly recommends that all new assessments are structured as new overlay assessment districts separate and stand-alone from the existing assessments and zones of benefit. Each new overlay assessment should be supported by a unique and separate Engineer's Report because a combined report will diminish legal defensibility. Moreover, if multiple assessment zones are contained in one assessment district and report, legal defensibility is diminished and the City would lose the advantage of having the balloting for each area being decided separately. The implications of these recommendations are extremely important, so SCI invites the City to discuss the considerations with our firm in further detail.

The following table summarizes SCI's proposed fees for preparing separate, legally defensible Engineer's Reports for each new proposed assessment district, conducting the assessment ballot proceeding, including preparing, printing and mailing out the notices and ballots and pre-paid return postage, handling property owner inquiries and requests for replacement and proportional ballots, and assisting with the public hearings, assisting with the tabulation of ballots and providing other professional services as described in the work scope for Phases IIB, IIC and IID. Please note that these proposed fees are based on the assumption that multiple new assessment districts would be conducted at the same time, as this provides efficiencies for our time, work scope and fees.

New Assessment District	Parcels	Engineer's Report	Assessment Balloting
Landscaping & Lighting	11,028	\$14,028	\$18,542
1 Tract 2851	88	\$3,088	\$2,132
2 Tract 2865	623	\$3,623	\$2,935
3 Tract 3032	269	\$3,269	\$2,404
4 Wm Ranch Rd	131	\$3,131	\$2,197
5 T-3019 & T-3525	217	\$3,217	\$2,326
7 LA @ Gabbert	107	\$3,107	\$2,161
8 Buffer	725	\$3,725	\$3,088
10 Mt. Meadows	2,493	\$5,493	\$5,740
6 Tract 3306	22	\$1,000	\$1,000
9 Condor Dr.	13	\$1,000	\$1,000
11 Tract 4174	9	\$1,000	\$1,000
		\$45,681	\$44,522

Note: the fees for new districts 6, 9 and 11 assume that these three small districts will be all balloted together and simultaneously with other new assessment districts on this table.

OTHER PROVISIONS:

Incidental costs incurred by SCI for the purchase of property data, maps, travel and other out-of-pocket expenses incurred in performing the scope of work under Phases I through IID shall be reimbursed at actual cost by the City, with total cost not to exceed \$2,800 without prior authorization from the City.

Note: all costs associated with this proposal and the scope of services can be financed or refunded by the assessment levies.



October 22, 2010

Mr. Ron Ahlers, Finance Director / City Treasurer
 City of Moorpark
 799 Moorpark Avenue
 Moorpark, California 93021

Re: Proposal to Provide Assessment Engineering Services for the City of Moorpark

Dear Mr. Ahlers:

We understand that the City of Moorpark ("City") seeks a consultant to provide assessment engineering services related to the rebalotting and possible re-structuring of its existing landscape maintenance district. These services would be provided in accordance with the requirements of the Landscaping and Lighting Act of 1972 and Article XIII of the California Constitution, and the Proposition 218 Omnibus Act (Prop 218). **You will find the enclosed proposal fully responsive to the overall needs of the City, based on our previous discussion.**

We believe that Willdan's combined strengths and experience will provide the City with the best support for the following reasons:

Unique Combination of Services and Expertise – The City of Moorpark has a need for a highly specific set of services requiring a precise range of expertise. Willdan staff has specific recent experience and skills in establishing new or increased assessments, and can provide the City with a well coordinated and comprehensive approach. **Our staff has worked extensively on Prop 218 related projects since its passage in 1996, and on benefit assessments of all types for over 30 years. Furthermore, Willdan has participated in industry and internal meetings and discussions to analyze and understand the impacts of recent court decisions in the Santa Clara Open Space, Tiburon and Riverside County cases, determine the effects on future assessment proceedings, and develop approaches for structuring assessments to maximize their technical defensibility going forward.** Willdan has long been at the forefront in creating defensible, well-supported assessment methodologies, so we feel that the Santa Clara decision was an extension of what we have always practiced, not a new approach.

Unmatched GIS Capabilities – To enhance the accuracy of parcel databases that are used, and support the defensibility of our approaches for Prop 218 balloting and re-engineering projects, Willdan has utilized Geographic Information Systems (GIS) for its assessment and special district projects over the past five years. We have the software and four full-time staff members who are well-versed in the practical application of GIS in these types of projects. Specifically, our proposed analyst for this project, Ms. Jennifer Carter, has worked on several recent projects involving extensive use of GIS technology; including projects for the Cities of Oceanside, Richmond, Burlingame, Dixon, Rialto and Arcadia.

Depth of Experience – Willdan has worked successfully on more than 100 special districts in the past 5 years alone, all of which were formed in compliance with Proposition 218 --recently for the Cities of Dixon, Richmond, Burlingame La Quinta, Chico. Most notable, due to our familiarity with the potential legal challenges, Willdan was recently selected to reassess the Orange County Vector Control District's Engineer Report to ensure that it is Proposition 218 compliant in light of recent court decisions, and was also selected by the City of Arcadia for the formation of a rebalotting of its landscape assessment district that was recently approved by property owners in July of 2010.

Willdan is excited about this opportunity to use our team's skills and expertise to assist the City of Moorpark. Please feel free to contact Mr. Habib Isaac, Senior Project Manager, to discuss any aspect of this proposal or to arrange for an interview with our team. He can be reached directly at (951) 587-3574 or via email to hisaac@willdan.com.

Sincerely,

WILLDAN FINANCIAL SERVICES

Mark Risco, Senior Vice President

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Scope of Services

Statement of Understanding

The City of Moorpark seeks a consultant to provide assessment engineering services related to a proposed new assessment which would address the existing landscape maintenance district. Based on our recent discussions with City staff, Willdan understands the City is seeking to determine whether a restructuring is necessary, and if there are properties within the City that need to be added and balloted as part of this proposed increase. Without a revenue mechanism to replace this existing assessment, the City would be faced with the prospect of maintaining existing improvements without a dedicated funding source, likely resulting in reduction or perhaps elimination of maintenance services.

Based on our conversations with City staff and the recent California Supreme Court decision regarding special benefit assessments (*Silicon Valley Taxpayers Association, Inc. versus the Santa Clara County Open Space Authority*), it is apparent that due to special benefit requirements, simply balloting for an assessment increase to the existing assessments is not a viable option. Therefore, the best approach may be to restructure the district and we will provide a feasibility analysis on this potential option. This will also provide the flexibility to create a new, more defensible methodology that accurately reflects the improvements and the current makeup of the City.

Key Study Issues

We have identified five key study issues and developed a comprehensive and thoughtful approach to the project. The key study issues and the strategies Willdan will utilize are provided below.

Issue #1: Understand and incorporate impacts of the recent Supreme Court decision into the development of the revised assessment.

Description	Approach
Any new assessment rates developed for the district will need to be technically defensible in light of the recent Supreme Court decision in the <i>Silicon Valley Taxpayers Association, Inc. versus the Santa Clara County Open Space Authority</i> case.	Willdan will incorporate our knowledge gained from extensive analysis of the Santa Clara case to ensure defensibility in the new proposed assessment, and incorporate elements we have already successfully used in other recent projects.

Issue #2: Develop a comprehensive budget that addresses both annual and long-term maintenance costs.

Description	Approach
Before creating the assessment methodology that will be the core of the new assessment structure, it will be necessary to create a thorough and thoughtful budget for the services to be funded by the assessment.	Willdan will utilize our extensive background in the formation and administration of special districts that provide services similar to those being contemplated for this modification, to assist the City in developing a budget that incorporates accurate and appropriate line items and costs.

Issue #3: Develop an appropriate method of allocating the cost of the maintenance services to the parcels within the district based on special benefits in light of recent court cases.

Description	Approach
Another key component of this project will be to develop an assessment methodology that equitably spreads the district's costs to properties that will be responsible for paying the assessments.	We will employ our experience developing assessment methodologies and our GIS capabilities to examine the current makeup of the parcels, understand the relationship between the properties and the improvements being maintained, and develop an assessment methodology that equitably spreads the costs.

Issue #4: Incorporating flexibility into the assessment methodology to ensure continued adequate funding for services through the assessments in future years.

Description	Approach
Assessments will be vital in allowing the City to continue providing landscape maintenance services. In addition, as costs for providing services increase over future years it is imperative that the City has the ability to keep the assessment revenues in line with expenditures.	Willdan will evaluate the current levels of service within the district, assist in identifying appropriate budget line items and assessment rates, and take a comprehensive approach to developing the service budget and appropriate inflation mechanism, to allow the new assessments to keep pace with future annual costs.

Issue #5: Expand and enhance public outreach and property owner communications.

Description	Approach
To enhance the likelihood of the approval of the formation of Moorpark's landscape assessment district, public outreach efforts and education will be essential.	Willdan has worked on numerous assessments for which we have facilitated property owner workshops and disseminated frequently asked question guides. Most recently, Willdan was successful for citywide assessments in the cities of Burlingame (2008) and Arcadia (2010).

Work Plan

Willdan has assembled a multi-disciplined project team to assist the City of Moorpark with assessment engineering related to the possible implementation of new assessment. The team has been designed to allow City staff to discuss all project elements with a single project member, Mr. Habib Isaac.

The following outlines our proposed work plan and services for assisting the City with the rebaloting of its landscape assessment district.

Since the overall approach to establish a district can vary significantly based on the improvements and/or services to be funded, the following work plan has been segmented into tasks (A-F), each focusing on the different elements of the process.

Task A: Review and Benefit Analysis for a City-wide Assessment

The overall goal of this project is to form a City-wide assessment that will provide a stable revenue source for the City to support specific improvements, services and facilities. The burden of establishing special benefit and assessments for any improvement requires a detailed review and evaluation of the improvements and services to be provided, all costs associated with those improvements and the relationship these improvements have to various properties in the City.

Task A1: Project Kick-off Conference Call

Objective: The primary objective of this conference call is to identify key personnel that will be involved in the overall project, establish effective lines of communication, identify potential funding needs and resources available (documents or information) that may be need for the project.

Description: We propose to kick-off the project by holding an "all hands conference call" to discuss the various elements of the project and develop an initial strategy and course of action to address the City's needs. This meeting should include City staff that will be directly involved in the project, as well as all key Willdan Team members. This call will likely include specific discussions of the City's goals and priorities; policies, legal and political considerations; project timelines; general City budget information; organizational structure; and availability and access to pertinent documentation and data.

This call will serve to identify the specific goals, components and criteria of the potential district, needed funding requirements and to identify any special circumstances associated with the formation of a special district.

Meetings: One (1) conference call.

Deliverables: Preliminary schedule.

Task A2: Identify and Prioritize the City's Funding Needs

Objective: Develop a funding priority list for the proposed new district.

Description: Willdan will work closely with City staff to identify and develop a comprehensive list of improvements, services and facilities, their associated annual expenditures, estimated future costs and other funding sources that may be available, in order to develop a funding priority list that may be funded by the assessment district.

Meetings: None.

Deliverables: None.

Task A3: Develop Preliminary Funding Model

Objective: Develop a preliminary district structure, assessment methodology model (simple methodology scenarios), and identify resulting potential assessment ranges and key issues for consideration.

Description: In order to quantify the best options for implementing a new assessment district, it will be necessary to develop an estimated range of assessments that would be necessary to provide the desired funding as well as key issues and considerations that need to be addressed for such a district.

Utilizing the priority list of funding needs identified in Task A2, electronic parcel data, improvement plans, budget information and related maps and documentation provided by the City, Willdan will review and develop a preliminary assessment model and potential assessment ranges for the funding needs identified in Task A2.

The goal of this evaluation and assessment modeling is to preliminarily identify:

- Costs and improvements for which a special benefit nexus may be possible;
- An overall sense of the City's proportional general benefit obligation;
- Possible variations in benefit that may require the establishment of zones;
- Prop 218 related issues or considerations; and,
- A general sense of the possible range of assessments that would be associated with the various improvements identified utilizing some basic weighted parcel benefit assumptions.

Meetings: None.

Deliverables: Summary of our findings and conclusions for discussion.

Task B: Survey/Polling of Potential Landscape Assessment District (Optional)

Proposition 218 Omnibus Implementation Act specifically states:

"...an impartial person designated by the agency who does not have a vested interest in the outcome of the proposed assessment shall tabulate the assessment ballots submitted, and not withdrawn, in support of or opposition to the proposed assessment."

To be in compliance with Proposition 218 and ensure all efforts in developing a defensible assessment methodology isn't compromised by a challenge due to the assessment engineer not being impartial, our proposal includes National Demographics Corporation (NDC) for conducting a community polling on the proposed increased assessment,

It is a challenging task to conduct public opinion polls that accurately determine funding levels likely to be approved. Few people are inclined to admit they welcome new taxes, assessments or fees on themselves. The accuracy and success of such projects require detailed and well-informed preparation, a carefully worded survey instrument, and sophisticated, experienced analysis of the responses. For this project, Willdan proposes to utilize the services of NDC, one of California's leading survey firms for local government assessment prospects and other local issues. The firm is known for the high quality of its research, advanced computing work, and experience in local revenue option surveys.

Task B1: Initial Survey Design and Field Test

Objective: Create a survey instrument to assist in determining property owner's support of a landscape assessment.

Description: In direct consultation with Willdan and the City, NDC will design a survey instrument for review and discussion. The instrument will test the target population's attitudes regarding potential funding of specific improvements and toward any potential assessment options, including a test of different levels of funding.

The survey instrument will be carefully crafted to:

- Provide realistic scenarios of funding levels and the service(s) each level would provide;
- Identify key decision factors driving respondent reactions to the proposals; and
- Determine the strength of respondent opinions and the resulting openness to messages for and against the proposed fee.

In NDC's experience, surveys of 12 to 15 questions are the most effective at achieving the City's goals. Should the City wish to add additional questions on this or any other topic, NDC is happy to do so, though such an expansion will impact the overall price.

NDC will target a specific number of respondents to achieve an industry-standard confidence level of 95%+ and a margin of error of not more than + /- 5% among our target population. (Drawing the sample is done simultaneously with the survey instrument development and does not add any time to the project schedule.)

Meetings: One (1) meeting at City Hall.

Deliverables: Survey instrument.

Task B2: Fielding

Objective: Conduct the survey.

Description: NDC conducts surveys either by mail, by telephone, online or in a combination of telephone, and mail and online questions, depending on the specific needs, goals, budget, timeline and target audience. In a community such as Moorpark, a mix of mail surveys to absentee landlords and telephone surveys to local residents would be likely.

The types of surveys utilized will depend on previous findings and analysis.

Telephone surveys will include a carefully scheduled mix of daytime, evening and weekend hours. All electronic and other records will be maintained for any desired review.

Telephone fielding of the survey typically requires five to 10 days, while mail-surveys, if included, typically require two to three weeks depending on the number of reminders sent to targeted participants.

Meetings: None.

Deliverables: None.

Task B3: Analyses, Interpretations and Conclusions

Objective: Develop interpretations, conclusions and results of the surveys received.

Description: Immediately following the completion of fieldwork, NDC will work with Willdan and the City to provide interpretations, conclusions and results. NDC's senior personnel will conduct this work. Responses will be analyzed by age, income, and other key demographic and community divisions. In addition, NDC will be fully responsive to requests for further cross-tabulation analysis.

NDC will incorporate survey results into hard copy and electronic form and will create a graphical Executive Summary of the results. Throughout this process, all NDC personnel will be instructed to maintain complete confidentiality on all aspects of the survey. This report will include the direct results, statistical analysis, an interpretation of the findings and NDC recommendations.

Meetings: None.

Deliverables: Executive summary outlining the survey results and recommendations.

Task B4: Presentation of Results

Objective: Present the results of the survey in a formal setting.

Description: A NDC principal will provide a presentation and discussion of results at a time convenient to the City. The presentation will include the methods, findings, and conclusions of this survey.

The results of the surveys will help the City determine if the community will support the proposed landscape assessment, and what level of additional community outreach will be needed. With this information, the City will be able to make clear decisions regarding next steps.

Meetings: One (1) meeting to present the final survey results to City Council.

Deliverables: None.

Task B5: Finalize Funding Objectives

Objective: Discuss the results of Tasks A and B and determine the next steps of the proposed landscape assessment project.

Description: The purpose of this discussion is to determine the future direction of the project. Possible topics of conversation could include:

- Determine the services and/or improvements to be funded by the proposed district, which could include park services, open space and/or lighting;
- Determine whether to pursue an assessment or a special tax; and/or
- Decide whether to further pursue the landscape district project.

Meetings: One (1) meeting to discuss the next steps/future of this particular work plan.

Deliverables: PowerPoint presentation documenting the findings and recommendations up to this point in the work plan.

Task C: Finalize Assessment Analysis

Willdan will refine the previous preliminary evaluation of the proposed improvements and maintenance requirements, as well as potential long-term costs associated with the proposed district improvements and facilities. Utilizing this evaluation, Willdan will develop an appropriate district structure, budget and financing plan to support the various improvements and activities. Based on the improvements and services and their relationship to properties, Willdan will establish an appropriate and defensible cost allocation analysis and district structure based on special benefit properties received from the improvements and services to be provided.

Task C1: Establish the Final Benefits/Improvements and Assessment Analysis

Objective: Develop an appropriate assessment methodology and benefit findings (general versus special), district structure (benefit zones), based on the provisions of the California Constitution and current case law.

Description: Utilizing the detailed improvement plans and previously established priority improvement list, parcel data and other supporting information; we will fully develop an appropriate and defensible benefit nexus for the proposed assessments that are in compliance with the California Constitution, specifically focusing on the identification of special and general benefits as it relates to the recent Supreme Court decision. The relationship between specific improvements and the properties within the City will be closely evaluated as well as any benefits that may be attributable as general benefit to properties within the City or the public at large.

Meetings: None.

Deliverables: None.

Task C2: Prepare Proposed Budget and Assessments

Objective: To prepare a comprehensive annual budget and corresponding assessment rates that are structured to achieve maximum cost-to-benefit equity for each of the properties within the district, and ensure the long-term financial stability of those improvements.

Description: Work with City staff to prepare an appropriate annual budget for the improvements. The budgets will be developed utilizing standard per unit costs for calculating annual expenses associated with the various improvements, specific cost estimates provided by the City, estimates of periodic maintenance expenditures; long-term repair and rehabilitation costs; applicable capital improvement expenditures, administration expenses; and any other funding deemed appropriate to provide the improvements. The proposed budget and assessments will also identify and include an appropriate inflationary adjustment (cost of living adjustment) applicable to future assessments.

Meetings: None.

Deliverables: Summary of the budgets and assessments.

Task C3: Technical Memorandum Summarizing Assessment Analysis

Objective: To provide the City with a memorandum summarizing the proposed district structure and assessments.

Description: Prepare and provide the City with a memorandum summarizing the proposed method of apportionment, budgets, assessments and descriptions that are considered necessary or appropriate for the implementation of the new assessments. ***This document will primarily focus on assessment factors that are necessary to ensure that the proposed new assessments comply with the special and general benefit provisions emphasized in the recent Supreme Court decision, and still provide adequate funding for the improvements and programs.*** When finalized with City staff, many of the sections of this document including the discussion of benefit; updated method of apportionment; budgets and proposed assessments; will be incorporated into the Engineer's Report to be prepared in Task D1.

Meetings: One (1) conference call with City staff to discuss and finalize the findings, recommendations and proposed assessments outlined in the technical memorandum.

Deliverables: One (1) technical memorandum summarizing and identifying the various findings and recommendations that are deemed appropriate or necessary to implement the proposed new assessments.

Task D: Documentation and Procedural Requirements for Proposed New Assessments

Task D1: Prepare Engineer's Report

Objective: Preparation of a comprehensive Engineer's Report based on findings, recommendations and assessments established with City staff in Task A through C.

Description: Based on findings and results from Task A through C, prepare an Engineer's Report that addresses the goals and objectives of the City, while integrating the method of apportionment and benefit analysis established in Tasks A through C. This report, prepared under the provisions of the California Constitution Article XIID (Prop 218), and applicable legislative authority (i.e., The Landscaping and Lighting Act of 1972) will be the basis for developing the assessment ballots and notices to be mailed to the property owners.

The Engineer's Report will contain the following information:

- Plans and specifications that describe the area of special benefit, the proposed new assessments, and the improvements;
- Method of Apportionment that outlines the special benefit conferred on properties from the improvements, as well as calculations used to establish each parcel's proportional special benefit assessment; plus a description of the assessment range formula that establishes the maximum assessment rate in subsequent fiscal years;
- Budget that outlines the costs and expenses to provide, service, and maintain the improvements, including authorized incidental expenses;
- Assessment Diagram that identifies the boundaries of the district;
- Assessment Roll that contains each of the Assessor Parcel numbers that comprise the district and the proportional new maximum assessment; and
- Affidavit stating that a professional engineer has prepared the report.

Meetings: None.

Deliverables: One (1) draft Engineer's Report for review by City staff prior to submittal to the City Council for approval.

Task D2: Prepare Draft Resolutions

Objective: Prepare draft resolutions for the Intent Meeting and Public Hearing.

Description: We will draft and forward resolutions to the City for review prior to the City Council meeting agenda deadline. Draft copies will be sent to City staff and the City's Attorney for review and comment prior to finalization. We anticipate that the following resolutions will be necessary.

- **Intent Meeting (two [2] resolutions):**
 - Resolution Initiating Proceeding; and
 - Resolution of Intention (preliminarily approves the proposed assessment increases outlined in the Engineer's Report; sets the Public Hearing date; and calls for mailed ballots).
- **Public Hearing (three [3] resolutions):**
 - Resolution declaring results of the balloting;
 - Resolution approving the Engineer's Report; and
 - Resolution confirming the new assessments, and ordering the levy and collection of assessments.

Meetings: None.

Deliverables: A total of five (5) Resolutions will be required for City Council's approval.

Task D3: Prepare Notices and Ballots

Objective: Prepare the necessary notices for the Public Hearing and the assessment ballots in compliance with Prop 218.

Description: Prepare the required notices for the Public Hearing and the assessment ballots to be mailed to each property owner. Draft copies will be sent to City staff and the City Attorney for review and comment prior to finalization of the documents.

Notices and ballots will be tailored so as to specifically address the assessments per individual property owner.

Meetings: None.

Deliverables: Draft notices and ballots will be delivered to City staff for review and comment prior to final versions prepared for mailing.

Task D4: Attend City Council Intent Meeting

Objective: Attend the initial City Council session.

Description: Attend the initial City Council session to be available to answer questions regarding the formation.

Meetings: One (1) City Council meeting initiating the formation process and calling for the Public Hearing.

Deliverables: None.

Task D5: Print and Mail Notices and Ballots

Objective: To print and mail out notices and assessment ballots.

Description: Upon adoption of the Resolution of Intention, print and assemble notices and ballots for mailing. Notices and ballots will be printed double sided, so as to save postage costs. A return number nine envelope addressed to the City Clerk will be included for the convenience of the property owners to mail back the assessment ballot.

Actual mailing will be performed by a mailing house that subcontracts to Willdan for mailings such as this. Ballots will be directed to be returned directly to the City Clerk and should not be opened until the close of the Public Hearing. Mailing of the ballots and notices will be done a minimum of 45-days prior to the Public Hearing date as required by law.

Meetings: None.

Deliverables: None.

Task E: Property Owner Balloting**Task E1: Public Hearing and Ballot Tabulation**

Objective: Attend the Public Hearing to answer questions and to assist in the tabulation of the returned ballots.

Description: Attend the Public Hearing to be available to answer any questions and to assist the City Clerk with the tabulation of the returned ballots.

Upon the close of the Public Hearing, the ballots that were received will be opened and the tabulation commenced. Upon completion of the tally, the results may be announced at either the same session or the next regularly scheduled session (depending on the number of ballots to be tabulated).

Ballots may be opened and tallied by the City Clerk with the assistance of Willdan staff. Willdan has developed ballot tabulation software that uses barcode scanning to electronically tabulate the ballots. This software provides a summary of the weighted ballot results as well as a record of each ballot tabulated.

Meetings: One (1) City Council Public Hearing and an additional day for tabulating the ballots at City Hall.

Deliverables: Ballot tabulation results.

City Responsibilities

To assist the Willdan Team, the City will provide the following information and/or services:

- Detailed listings and descriptions of the improvements included in the district or to be reviewed as part of our scope of work, and the budgets and associated expenditures or revenues associated with the improvements, services and/or facilities. We may also request a breakdown of any existing improvements versus proposed improvements that may be incorporated into the new district. Provide (as needed) pertinent budget information, including estimated maintenance costs, replacement costs, other capital expenditures, City overhead, and available funding from other sources that can be used to offset costs.
- Various maps or diagrams (either electronically or in hardcopy) of the district and improvements.
- Prepare internal memorandums, staff reports, and other supporting documents necessary for City Council agendas.
- Arrange for any required publication notices of Council meetings or Public Hearings in the local newspaper.
- Review the draft reports and resolutions before the final documents are prepared for the Council packets. This review is usually performed by department staff, but may include the City Attorney. Requested changes shall be submitted to Willdan in writing.
- Willdan will rely on the validity and accuracy of the agency's data and documentation to complete our analysis.

Legal Opinions. In preparing the resolutions, notices and ballots, Willdan will provide our professional expertise. Since we do not practice law, we ask that the City's Attorney, or other designated counsel, review the documents. We will assist your attorney in identifying any pertinent legal issues.

Fees for Services

Willdan purposes to perform the tasks outlined in the Work Plan subsection for the fees identified below (Exhibit 1).

City of Moorpark Assessment Engineering Services	
Service	Fee
Assessment Engineering and Balloting Services	\$23,000
Survey/Polling of Potential New Landscape District (Optional)	\$12,500

Exhibit 1

Note:

- **Our fee will not be contingent on the outcome of the proposed assessments and/or the formation of the district.**
- The fees identified above do not include direct expenses associated with the printing, processing and postage of mailing the notices and ballots. We will bill the City for direct expenses associated with mailing costs at \$1.00 per unit.
- Telephone conference calls are not considered meetings and are not limited by our proposal.
- Additional services, including additional meetings, may be authorized by the City and will require an additional fee.
- We will bill the City monthly based on percent of the project completed by task.
- As part of the mailing process, related to notices, ballots and public outreach materials, postage must be paid in advance to the mailing house before they will proceed with the mailing. Willdan will provide a postage estimate to City staff in order to receive funds prior to the mailing. Any remaining unused postage will be applied toward payment against our next regular invoice for services.

Additional Services

Additional services may be authorized by the City and will be billed at our then-current hourly overhead consulting rates. Our current hourly rates are:

Willdan Financial Services Hourly Rate Schedule	
Position	Hourly Rate
Group Manager	\$210
Principal Consultant	\$200
Senior Project Manager	\$165
Project Manager	\$145
Senior Project Analyst	\$130
Senior Analyst	\$120
Analyst	\$100

**Willdan Financial Services
Hourly Rate Schedule**

Analyst Assistant	\$75
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Staffing

Our management and supervision of the project team is very simple: staff every position with experienced, capable personnel in sufficient numbers to deliver a superior product to the City, on time and on budget. With that philosophy in mind, we have selected experienced professionals for the City of Moorpark's engagement. We are confident that our team has a depth of experience that will successfully fulfill the City's desired work performance.

Mr. Habib Isaac, Senior Project Manager, will serve as **project manager** for this engagement. He will organize and direct consultant tasks and ensure deliverables are completed on time and within budget. Mr. Isaac will be the City's day-to-day contact and will also be present at meetings during the engagement. He has extensive assessment formation experience and Proposition 218 expertise. He specializes in consulting with public agencies to advise them on how to successfully implement new financing districts including 1972 Act Landscaping and Lighting Districts, 1913/1915 Assessment Districts, 1982 Act Benefit Assessment Districts, Community Facilities Districts (CFDs), Fire Suppression Assessments; as well as to determine the feasibility of utilizing such districts.

Ms. Jennifer Carter will serve as the **lead analyst** for the City's project. She will be responsible for data gathering and report drafting, with ongoing review of work products. Ms. Carter will also be responsible for coordinating with the City to ensure that data gathering tasks proceed smoothly and to minimize the burden on City staff.

Mr. Douglas Johnson, President of National Demographics, will oversee and will **oversee the opinion polling efforts**. He is a statistical and demographic expert with a long history of working with local communities through surveys, focus groups and community forums.

Mr. Richard Kopecky, P.E., will serve as the **assessment engineer** for the City. He has been selected for this role due to his 43 years of civil engineering experience. Mr. Kopecky has experience in administration and preparation of engineering development control ordinances; and the establishment of development requirements related to drainage, roads, sewers, soils and geology, and water.

Mr. Chris Fisher, Group Manager, will serve as **technical advisor and overall principal-in-charge**. His responsibilities will include overseeing the quality of work products and assuring timely completion of the project. He will also provide quality control for work products and ensure deliverables are completed on time and within budget. Mr. Fisher is one of our lead consultants and technical advisors for special district formation projects.

Habib Isaac

Project Manager

Education

*Bachelor of Science,
Applied Mathematics with
emphasis in computational
science, San Diego State
University*

Areas of Expertise

*Assessment District
Formations*

*Extensive Experience with
Large Proposition 218
Balloting Measures*

*Benefit Assessment
Analyses*

*Formation of Community
Facility Districts*

Reassessment Reports

Publications

*"Cryptography with
Cycling Chaos," Physics
Letter A, V 303;
Pages 345-351(2002)*

8 Years Experience

Habib Isaac, Senior Project Manager, has been selected to serve as **project manager** for this engagement due to his extensive assessment formation experience and Proposition 218 expertise. He specializes in consulting with public agencies to advise them on how to successfully implement new financing districts including Community Facilities Districts (CFDs), 1913/1915 Assessment Districts, 1982 Act Benefit Assessment Districts, 1972 Act Landscaping and Lighting Districts, Fire Suppression Assessments; as well as to determine the feasibility of utilizing such districts.

More specifically, Mr. Isaac has been involved with the preparation of over 50 Engineer's Reports and Proposition 218 ballot proceedings, through the formation of various Special Districts and Fire Suppression Assessments. Mr. Isaac has a thorough knowledge of the special benefit provisions of Proposition 218. Furthermore, he has facilitated numerous successful protest balloting proceedings, in compliance with the State Constitution, including two successful ballot proceedings encompassing a total of 13,000 and 20,400 parcels.

Related Experience

City of Arcadia – Citywide Lighting District 2010-1: Recently completed a 1972 Act district formation project requiring the creation of a citywide parcel database, including multiple benefit zones. The project also involved the noticing and balloting of affected property owners.

City of Palm Desert – Assessment District 2004-02 (Section 29): As Project Manager, Mr. Isaac was responsible for the formation of a 1913/1915 Act Assessment District to fund infrastructure improvements, which include storm drain / flood control improvements, a four acre detention basin, streets, and sewers. He developed an assessment methodology which accounted for various property types ranging from multi-family units to industrial properties to big box commercial. In addition, Mr. Isaac was responsible for determining the benefit nexus based on types of properties within the Assessment District and their relationship to the improvements. Assessment proceedings incorporated numerous meetings with City staff and stakeholders prior to finalizing the Engineer's Report – \$29.4M Bond Issue; formed in August 2007.

In addition, Mr. Isaac formed an overlapping 1982 Act Benefit Assessment District to fund the ongoing annual maintenance of the four acre detention basin constructed through Assessment District 2004-02.

City of Solana Beach – Formation of Assessment District Nos.: 2005-1 (Barbara-Granados), 2005-2 (Pacific), and 2008-1 (Marsolan Avenue): For these three separate utility undergrounding assessment districts, Mr. Isaac coordinated Willdan's efforts for the completion of the Engineer's Reports and documents necessary for the formation of the districts, and coordinated with the City's consultant to manage the project through to completion and conduct public outreach efforts, including public presentations of project details and background.

Jennifer Carter

Analyst

Education

*Bachelor of Science,
Criminology, University of
La Verne, California*

*UCLA Extension –
Fundamentals of Land-
based Financing:
Assessment Districts and
Mello-Roos Districts*

Areas of Expertise

*Special District
Formations*

*Assessment
Methodologies*

GIS Analysis

Databases and Mapping

*CAD Assessment
Diagrams*

Parcel Verification

*Rate and Method of
Apportionment*

*Proposition 218 Balloting
Processes*

Seminars

*California Debt and
Investment Advisory
Commission*

5 Years Experience

Jennifer Carter will provide **analytical support** for City of Moorpark's engagement. As a senior analyst, Ms. Carter's responsibilities include coordinating and conducting activities involved with all aspects of the formation and annexation processes of special districts including data gathering and providing support to senior associates. She is also responsible for projects involving the use of geospatial technology, as well as the creation of boundary maps in CAD and GIS. Client interaction also falls under her purview.

Related Experience

City of Arcadia – Citywide Lighting District 2010-1: Identified and analyzed local lighting improvements, proposed budgets, parcel maps, and cost-to benefit equities. Prepared parcel database, District budget, assessment diagram, multiple public outreach mailers, engineer's report, notice and ballots. Worked directly with City staff and project team to coordinate, create and process public outreach materials.

La Quinta - Citywide Landscaping and Lighting District Feasibility Study: Identified and analyzed park, trail and open space improvements, budgets and cost-to benefit equities. Prepared proposed feasibility options including a budget, visual aid diagrams and feasibility report. Assisted with the preparation and presentation of feasibility study options to City staff in July 2009.

City of Richmond - Marina Bay Landscaping and Lighting Maintenance District: Identified and analyzed local park, trail and landscaping improvements, budgets, parcel maps, and cost-to benefit equities. Prepared District budget, assessment diagram, Engineer's Report, notice, ballots and resolutions. Assisted in the preparation of public outreach information, presentations and education sessions with Marina Bay property owners and City staff. Worked directly with the District administrator to ensure the levy of assessments on the current fiscal year's annual property tax roll. District was formed in August 2009.

City of Rialto – Ongoing Special District Formation Projects: Willdan has a long-standing relationship with the City of Rialto in terms of special district formations, and has worked on multiple Landscape and Lighting District formation and annexation projects. During these engagements, the Willdan Team has assisted with all phases of the formation process, completion of the Engineer's Report, noticing and balloting of affected property owners, and public outreach.

Redevelopment Agency of San Jose - San Jose Convention Center Facilities District No. 2008-1: Identified and analyzed hotel properties and related improvements within the City of San Jose as well as data related to their transient occupancy tax calculation. Assisted in the preparation of the cost estimate, tax spread, rate and method of apportionment, boundary map and associated visual aids. Managed and prepared the mailing of letters, notices, ballot pamphlets, and validation action letters to property owners and pertinent hotel contacts. District was formed in August 2009.

City of Placentia – Street Light District No. 81-1 and Landscape Maintenance District No. 92-1 Parcel Audit: Identified and isolated the District administrator's levied parcels for the current fiscal year within each District utilizing GIS technology. Created GIS layers identifying parcels within each District. Conducted research to determine accuracy of parcel assessments within each District. Presentation of audit findings and associated visual aids to City staff and the District administrator in July 2009.

Douglas M. Johnson

President, National Demographics Corporation

Education

Claremont Graduate University, Ph.D.
 Candidate, 2003 – Present

UCLA, Anderson Graduate School of Management, MBA, 1999

Bachelor of Science, Claremont McKenna College

Professional

Affiliates

Latinos and Redistricting: "Californios For Fair Representation" and California Redistricting in the 1980s. Rose Institute of State and Local Government

"Competitive Districts in California." Rose Institute of State and Local Government, 2005

Restoring the Competitive Edge: California's Need for Redistricting Reform and the Likely Impact of Proposition 77. Rose Institute of State and Local Government, 2005

19 Years Experience

Douglas Johnson, President of National Demographics Corporation has 19 years of experience. Mr. Johnson has been with National Demographics Corporation for the past 7 years and has 12 years of prior experience working with such firms as Rose Institute of State and Local Government, Sourcemine and Digital Media Campus.

Related Experience

- **San Diego City Schools** - School District Redistricting, 2003
- **Clark County (NV)** - County Commission Redistricting, 2006
- **City of Banning** - Survey, 2003
- **City of Bradbury** - City Council Redistricting, 2005
- **City of Elk Grove** - City Council Redistricting, 2004
- **City of Perris** - Surveys, 2004 and 2006
- **Consolidated Water District** - Board of Directors Redistricting, 2002
- **Las Virgenes** - Malibu Council of Governments - 2004
- **Los Angeles County Fair Association** - Surveys and Community Relations, ongoing
- **Mojave Water Agency** - Board of Directors Redistricting, 2002
- **San Bernardino Valley Water District** - Board of Directors Redistricting, 2002
- **San Diego Unified School District** - Board Redistricting, 2003
- **San Gabriel County Water District** - Districting Analysis, 2003
- **West Basin Municipal Water District** - Board of Directors Redistricting, 2006
- **Los Angeles County Fairplex** - Multiple surveys, grassroots organization, and government relations, 2002 – 2006

Richard Kopecky, P.E.

Assessment Engineer

Education

*Bachelor of Science,
Civil Engineering;
University of Illinois*

Professional

Affiliations

*American Public Works
Association*

*American Society of Civil
Engineers*

Professional

Registrations

*Registered Professional
Engineer since 1966:
RCE 16742*

43 Years Experience

Richard Kopecky, PE will serve as the **assessment engineer** for the City's project. He has been selected to serve in this capacity due in part to his 43 years of civil engineering experience. Mr. Kopecky is experienced in the administration and preparation of engineering development control ordinances; and the establishment of development requirements related to drainage, roads, sewers, soils and geology, and water.

In addition, Mr. Kopecky manages engineering, building and safety, and public works departments on both a full and part-time contract basis for several Southern California cities. He has utilized his extensive experience in developing solutions for the problems and challenges faced by most engineering and building and safety departments by serving as the designated Engineer, Building Official, and/or Public Works Director. Mr. Kopecky's management skills extends to the full services of these departments, including Assessment Districts; budgets; building and safety plan check and inspection; City traffic engineering; community development block grants; construction management and surveying; development and infrastructure review; disaster response and recovery; fee studies; Special District formation; landscape architecture; planning; and public works, water, and wastewater design. He also developed and implemented the capital improvement programs for many Southern California agencies.

Related Experience

Metropolitan Water District of Southern California - Standby Fees: Annually assists in administering and placing on the tax roll over 950,000 parcels of MWD's Readiness-to-Serve (RTS) Standby Charge for each of its 26-member agencies. Also responsible for reviewing requests for exemption from the RTS by property owners and preparing a report on our findings to MWD.

City of Cathedral City –Cove Improvement District: In the role of assessment engineer, Mr. Kopecky was part of the Willdan project team that formed the City of Cathedral City's Cove Improvement District No. 2004-02. The District financed the construction of approximately \$32 million of sanitary sewer facilities, road and street improvements, and related curb and gutter improvements to an area within the City, comprised of approximately 1,500 parcels. The sewer facilities were constructed to serve an area previously served by private onsite septic systems. Due to a state mandate, these homes were required to be off septic systems by a certain date, necessitating the construction of public sanitary sewer facilities. The project scope included the Engineer's Report, fieldwork, assessment methodology, and ballot proceedings.

City of Palm Desert – Section 29 Assessment District No. 2004-02: In the role of assessment engineer, Mr. Kopecky was part of the Willdan project team that assisted with the formation of the City of Palm Desert's Section 29 Assessment District. The District finances a wide range of public infrastructure improvements for a large mixed-use master development that includes detached single-family homes, condominiums, apartments, and a variety of commercial uses. Improvements included sanitary sewer, storm drain, water, street, and dry utilities. To finance the improvements, bonds were issued in the amount of \$38.5 million. The Willdan Team prepared the Engineer's Report, as well as the related proceedings in meeting the requirements of the 1913/1915 Acts and Proposition 218.

Chris Fisher

Technical Advisor / Principal-in-Charge

Education

San Francisco State University, Bachelor of Science, Finance

Areas of Expertise

Multi-disciplinary Team Management

Special District Formations

Client Presentations

Affiliations

California Society of Municipal Finance Officers

Municipal Management Association of Northern California

California Municipal Treasurers Association

10 Years Experience

Chris Fisher will serve as the **technical advisor / principal-in-charge** and will share his special district formation knowledge throughout the project. Mr. Fisher will also provide technical guidance to ensure the defensibility of the assessment in light of the recent California Supreme Court decision regarding special benefit assessments (*Silicon Valley Taxpayers Association, Inc., v. the Santa Clara County Open Space Authority*).

Presently, Mr. Fisher is the Financial Consulting Services Group Manager at Willdan Financial Services. With more than 10 years experience at Willdan, he has managed an array of financial consulting projects for public agencies throughout California, coordinating the activities of resources within Willdan, as well as those from other firms working on these projects. He is one of the firm's leading experts for special district financing related to public infrastructure, maintenance and services, including public safety.

Related Experience

City of Arcadia – Citywide Lighting District 2010-1: Was the principal-in-charge for the recently completed 1972 Act district formation project for the City. Mr. Fisher oversaw the entire project including the creation of a comprehensive parcel database, and the development of a complex and defensible benefit analysis and assessment methodology that included multiple benefit zones. The project also involved the noticing and balloting of affected property owners and a coordinated public outreach effort.

City of Rialto – Ongoing Special District Formation Projects: Willdan has a long-standing relationship with the City of Rialto in terms of special district formations, and has worked on multiple Landscape and Lighting District formation and annexation projects. During these engagements, the Willdan Team has assisted with all phases of the formation process, completion of the Engineer's Report, noticing and balloting of affected property owners, and public outreach.

City of Palm Desert – Assessment District 2004-01 and Benefit Assessment District No. 1 Formation Proceedings: In collaboration with Willdan engineers and financial analysts, consultants of the City, and with various developer consultants representing five different development entities, Mr. Fisher coordinated the formation of two assessment districts for this mixed-used project in the City of Palm Desert. The primary bonded assessment district was formed to finance approximately \$38 million in backbone public infrastructure improvements, including streets, sewers and storm drains. The secondary district was established to provide for ongoing maintenance of the storm drain facilities. This effort included coordination with City staff and a diverse project team composed of City consultants, along with developer/land owners and their consultants. These formations required the preparation of draft and final Engineer's Reports for the districts, along with related documentation and analysis, and presentation of these items to the Palm Desert City Council.

City of Burlingame – Storm Drain Fee Implementation: Worked with City staff and a diversified consulting team, including a polling consultant and a community outreach/public communication firm to complete the following project elements: completion of an engineering analysis for a technically-based property-based storm drain fee; worked concurrently with the polling consultant to coordinate a

comprehensive poll of property owners and residents in the City, and finally, worked with the outreach consultant, and the rest of the team and City staff, to develop strategies for public communication and education for the proposed fee, incorporating elements of the technical engineering study, and the polling results.

City of Solana Beach – Formation of Assessment District Nos.: 2005-1 (Barbara-Granados), 2005-2 (Pacific), and 2008-1 (Marsolan Avenue): For these three separate utility undergrounding assessment districts, Mr. Fisher coordinated Willdan's efforts for the completion of the Engineer's Reports and documents necessary for the formation of the districts, and coordinated with the City's consultant to manage the project through to completion and conduct public outreach efforts, including public presentations of project details and background.

City of Cathedral City – Cathedral City Cove Improvement District No. 2004-02: For this \$39 million sewer and street improvement project, encompassing over 1,500 existing homes and businesses, Mr. Fisher coordinated the activities of engineers and financial analysts at Willdan, and coordinated with the City's outreach consultant and a mailing house, to complete the necessary outreach efforts and mailing of ballot materials to properties in the district. The project stretched over 18 months, and included over 15 meetings with City staff and other consultants to coordinate phases and tasks for the project.

Firm Experience

The Pomona PBID engagement serves as evidence that Willdan's assessment methodologies are technically defensible and Proposition 218-compliant.

Willdan has been at the forefront in Proposition 218 compliance since its implementation in November 1996. With the passage of this constitutional amendment, new focus was placed on assessment methodologies and determination of benefit. This focus, coupled with the 2008 Supreme Court decision in the *Silicon Valley Taxpayers' Assn., v. Santa Clara County Open Space Authority*, placed a greater emphasis on technical competency in developing and implementing assessments. We have worked successfully on more than 100 special districts in the past 5 years alone, all of which were formed in compliance with Proposition 218. These efforts have included preparing and mailing notices and ballots, providing comprehensive Engineer's Reports, tabulating assessment ballots, preparing long-range financial evaluations, and assisting with various public education efforts.

Our qualifications in special district formations and Proposition 218 are further exemplified by the fact that the assessment methodology developed by Willdan for the City of Pomona's Property and Business Improvement District (PBID) has been upheld in court twice. The second time the formation was upheld by the Court of Appeal after the California Supreme Court ruling in the Santa Clara County decision.

References

This section identifies current/former municipal clients, in which similar services have been performed. Client contact information and type of service is identified.

City of Arcadia

Assessment District Formation and Balloting Services

Willdan recently completed the formation of a citywide street lighting district, and coordinating with the Lew Edwards Group for the public education component of the project. This project included in-depth evaluation of the City's street lighting system and development of an appropriate special benefit nexus and assessment methodology consistent with the provisions of the California Constitution Article XIID (Proposition 218), and development and execution of a targeted outreach strategy. This evaluation resulted in the formulation of a proposed multi-zone assessment district, various public education materials and ultimately assessment balloting for over 16,000 parcels.

City of Tracy

Special Assessment District Formation and Administration Services

Willdan provides Community Facilities District, Local Improvement District and Landscaping District formation and administration, along with Arbitrage Rebate, and Delinquency Management services to the City of Tracy. Willdan staff maintains the parcel databases and administers the annual levy of Special Taxes for the Agency's CFDs, LIDs and Special District, comprising of over 16,000 parcels.

Contact Information

Tom Tait
Public Works Services Director
(626) 256-6584

Contact Information

Anne Bell
Management Analyst II
(209) 831-4473

Contact Information
Ann Cululi-Weaver
Management Analyst
Tel #: (760) 777-7113

City of La Quinta

Citywide Landscaping and Lighting District Feasibility Study

This project included the feasibility and benefit analysis in connection with the possibility of forming a Citywide Landscaping and Lighting District for parks, trails and open space areas within the City of La Quinta. The scope included the identification and analysis of park, trail and open space improvements, budgets and cost-to benefit equities. Preparation of proposed feasibility options including a budget, visual aid diagrams, feasibility report and the presentation of feasibility study options to City staff were also provided.

Contact Information
Alan Wolkin
Director of Redevelopment
(510) 307-8140

City of Richmond

Special Assessment District Formation and Administration Services

Willdan recently completed the successful formation of a large special assessment district in July 2009. This particular formation is significant in that it involved a large, fully-developed area within the City of Richmond, for which improvements were previously funded by the City's General Fund. The project required extensive public outreach and coordination with community leaders.

Ongoing annual Special District Administration Services are also provided for the City's six districts, including administration of the City's 1915 Act Assessment Districts, Landscape Maintenance District, and Community Facilities District comprising over 2,400 parcels. District administration duties include preparing the Annual Special Tax and Assessment Levy Report, annually calculating and apportioning the Special Taxes/Assessments, maintaining and updating the City's database containing parcel/levy amounts, providing levies to the County Auditor/Controller's Office for placement on the annual property tax roll, fielding property inquiries via our toll-free number, monitoring delinquencies, preparing the Notice of Special Tax/Assessment, attendance at City meetings, and performing all required bond call spreads.

Contact Information
Syed Murtuza
Public Works Director
(650) 558-7230

City of Burlingame

Citywide Storm Drain Fee Initiative

The City of Burlingame identified \$40 million in infrastructure improvements necessary to alleviate severe flooding conditions throughout the City. In order to maintain existing service levels for operations funded by an increasingly constrained General Fund, the City decided to pursue an alternate financing resource under the mandates of Proposition 218. Willdan and the LEW Edwards Group was retained to provide a turn-key project involving the components: 1) Completion of an Impervious Area Study to determine the contribution of storm water runoff into the storm drain system for each parcel in the City in order to establish an equitable fee for each parcel based upon land use; 2) Development of the required Engineer's Report; 3) A scientifically valid Public Opinion Poll to gauge property owner support or opposition to the proposed fee. The results must be accurate within a +/-5% margin of error; 4) A comprehensive community education campaign involving print and electronic media, a speakers' bureau, and work with citizen groups; 5) Proposition 218 Public Noticing and Ballot Management.

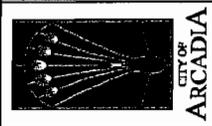
This project was completed in July 2009 with a successful outcome.

City of Fairfield

On-Call Special District Formation and Annexation Services

Contact Information
Tom Martian
Landscape Maintenance Manager
(707) 428-7478

Willdan has been assisting the City of Fairfield since 2004 with numerous formations and annexations of Community Facilities Districts and Landscape Maintenance Districts (LMDs). Furthermore, in addition to the required Proposition 218 balloting and tabulation, some of these projects have included extensive public outreach efforts including community meetings and property owner workshops.



Arcadia's Local Citywide Lighting District IMPORTANT VOTING INFORMATION

PLEASE NOTE: This is an issue that affects us locally and is not related to the recent California Statewide Primary election. Arcadia's current local assessment for street lights will expire on June 30, 2010.

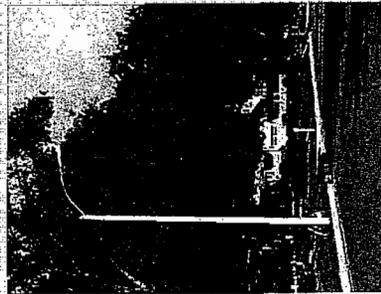
How Do I Vote?

Ballots were mailed to you with a return envelope.

- The ballot must be completed by the property owner(s), or an authorized representative.
- Clearly mark the appropriate box, sign and mail back the ballot in the envelope provided.
- Completed ballots must be received by the Arcadia City Clerk no later than the close of the Public Hearing, which is scheduled to begin at 7:00 p.m. on July 20th.
- Please allow sufficient time for mail delivery.

OR

- Hand deliver your ballot to the office of the Arcadia City Clerk.
- Completed ballots must be received no later than the close of the July 20th Public Hearing, which is scheduled to begin at 7:00 p.m. in the Council Chambers, 240 West Huntington Dr.



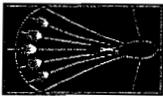
How will Ballots be Tabulated?

- Ballot tabulation will begin at the conclusion of the Public Hearing.
- Ballot tabulation will be held in City Council Chambers, 240 W. Huntington Drive, and is open to the public.
- Ballot tabulation will be from 8:30 a.m. – 5:00 p.m. each day, until all received ballots have been counted.



When will Results be Announced?

- After all ballot tabulation is complete, results will be announced at the City Council Public Hearing on August 3, 2010.
- Majority approval of the ballots returned is a successful measure.



CITY OF
ARCADIA

City of Arcadia
240 W. Huntington Drive
Arcadia, CA 91006

RETURN YOUR LOCAL LIGHTING ASSESSMENT BALLOT BY JULY 20TH!

Arcadia's Lighting Assessment District has been in place for 57 years — but funding to repair and maintain street lights will expire June 30, 2010.

On June 1st the Arcadia City Council approved the issuance of ballots to all property owners in Arcadia for consideration of an annual assessment for the City's Lighting Assessment District.

Please check the mail for your ballot. Make sure to fill it out and send it back so your vote can be counted. Ballots must be received by the City on July 20th.

If you have questions about the assessment, street lighting maintenance, voting procedures or the process, please call Public Works Services Director Tom Tait at (626) 305-1386 or email LightingInfo@ci.arcadia.ca.us.



RESOLUTION NO. 2011 - _____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MOORPARK, CALIFORNIA AMENDING THE FISCAL YEAR 2010/2011 BUDGET OF THE GENERAL FUND (1000) TO PAY FOR CITYWIDE POLLING AND ENGINEERING WORK TO SEEK AN INCREASE IN ASSESSMENT FOR THE STREET LIGHTING AND LANDSCAPE MAINTENANCE DISTRICTS

WHEREAS, on June 16, 2010 the City Council adopted the Operating and Capital Improvement Budget for Fiscal Year 2010/2011; and

WHEREAS, a staff report has been presented to the City Council summarizing SCI's proposal for a survey and engineering work for the street lighting and landscaping districts; and

WHEREAS, a budget appropriation increase of \$100,000 in the General Fund (1000) is requested for the survey and engineering work; and

WHEREAS, Exhibit "A" hereof describes said budget amendment and its resultant impact to the budget line item.

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF MOORPARK DOES HEREBY RESOLVE AS FOLLOWS:

SECTION 1: That a Budget Amendment in the aggregate increase of \$100,000 from the General Fund (1000), as more particularly described in Exhibit "A", is hereby approved.

SECTION 2: The City Clerk shall certify to the adoption of this resolution and shall cause a certified resolution to be filed in the book of original resolutions.

PASSED AND ADOPTED this 19th day of January, 2011.

Janice S. Parvin, Mayor

ATTEST:

Maureen Benson, City Clerk

Attachment: Exhibit 'A': Budget Appropriation

**Budget Amendment for
General Fund
For Citywide Survey and Engineering Work to Increase Assessments
for Street Lighting and Landscape Maintenance Districts
FY 2010/11**

A. Fund Allocation

Fund Description	Account	Amount
General Fund	1000-5500	\$ 100,000
	Total	\$ 100,000

B. Appropriation Allocation

Budget Number	Adopted Budget	Budget Change	Revised Budget
1000-1100-000-9103	\$ 0	\$ 100,000	\$ 100,000

Finance Approval: 