

**MOORPARK CITY COUNCIL
AGENDA REPORT**

TO: The Honorable City Council

FROM: Ron Ahlers, Finance Director 

DATE: January 10, 2011 (CC Meeting of February 2, 2011)

SUBJECT: Consider Resolutions to Initiate Proceedings Related to the Citywide Landscape and Lighting Maintenance Assessment District and the Parks and Recreation Maintenance Improvement District for Fiscal Year 2011/2012 and Consider the Amendment to the Agreement with SCI Consulting Group for Professional Consulting, Engineer of Work and Levy Administration

BACKGROUND

Landscape and Lighting Maintenance Assessment Districts:

In 1984, a Landscape and Lighting Maintenance Assessment District (AD84-2), encompassing the entire City, was created to fund costs associated with street lighting and the maintenance of various landscaped areas. This was a successor to the District enacted by the County of Ventura prior to the incorporation of the City. In subsequent years, Zones of Benefit (Zones) were added to fund the maintenance of specific areas. Later, these Zones were changed to District 1 through District 12.

Since 1984, the City has formed additional Assessment Districts (AD) to fund the maintenance of certain landscape improvements in and adjacent to:

2001	District 14 - Tract 5201, Wilshire Builders	(AD01-1)
	District 15 - Tract 4928, Toll Brothers	(AD01-2)
	District 16 - Tract 5161, Cabrillo	(AD01-3)
2004	District 18 - Tract 5307, Colmer Development	(AD04-01)
2005	District 19 - PM 5264, M&M Development	(AD05-01)

2006	District 21 - Tract 5133, Shea Homes	(AD06-01)
2007	District 22 - Tract 5045, Pardee Homes	(AD07-01)
	District 20 - Tract 5187, Lyon Homes	(AD07-02)
	District 24 - IPD 2000-10, Casino Storage	(AD07-04)
2008	District 25 - CPD 2004-01, Nearon	(AD07-03)
2009	District 26 - CPD 2004-03, Warehouse Discount Center	(AD09-01)
2010	District 31 - CPD 2005-02, Tuscany Square Park Lane and Moorpark Avenue	(AD10-01)
	District 32 - CPD 2005-03, HFR Investment I, LLC 145 Park Lane	(AD10-02)

Note: Districts 13, 17 and 30 are not assigned. District 23 - Tract 5130, Suncal/Vistas is not completed.

Parks and Recreation Maintenance Improvement District:

In July 1999, the City successfully established a Parks and Recreation Maintenance and Improvement District. The current Maintenance District is based on a "special" assessment. This means that the City assesses property owners for that portion of park and recreation maintenance and improvement activities that generate a "special" benefit. The City is responsible for funding activities that generate a "general" benefit.

The Park and Recreation Maintenance and Improvement District include all existing eighteen (18) City parks. The amount of the assessment levied may be adjusted annually by a Cost of Living factor, not to exceed three percent (3%).

DISCUSSION

As part of the annual budget process, the City Council considers whether or not to renew the subject Assessment Districts and levy amounts for the upcoming fiscal year. According to State law, before assessments may be levied, an Engineer's Report must be prepared for each assessment district setting forth the amount of the assessments and the basis for establishing said amount.

The preparation of an Engineer's Report does not obligate the City to approve the Engineer's Report nor to proceed with levying assessments. The purpose of the Engineer's Report is to merely develop the information necessary for the City Council to make those decisions. The report sets forth the items proposed to be funded by the district and the methodology used to distribute maintenance and improvement costs to all of the properties within each district.

When completed, each Engineer's Report is submitted to the City Council for approval. Approval of an Engineer's Report by the City Council does not require the City to levy the assessments. Such approval merely allows the Engineer's Reports, and the measurements set forth therein, to be considered at subsequent public hearings.

In accordance with the requirements of applicable State law, the Resolutions attached as Exhibits 1 and 2 initiate the process required for the City Council to consider continuation of the subject Assessment Districts. Upon adoption of these Resolutions, the Assessment Engineer will prepare an Engineer's Report for the Citywide Landscape and Lighting Assessment Districts and a separate Engineer's Report for the Parks and Recreation Maintenance Improvement District.

SCI Consulting Group (SCI) has been providing assessment district engineering services and levy administration to the City for the last ten years. Staff proposes that City Council authorize staff to amend the current professional service contract with SCI. The amendment includes:

- Expansion of the scope of work to include the newly formed Assessment Districts – Tuscany Square and HFR Investment I, LLC;
- Extension of the term for five (5) years; and
- Increase of the maximum compensation for each fiscal year.

Fiscal Year	Landscape and Lighting Assessment Districts¹	Parks and Recreation Maintenance Improvement District	Contingency²	Total
2011/2012	\$ 12,050	\$ 9,350	\$ 3,000	\$ 24,400
2012/2013	\$ 12,050	\$ 9,350	\$ 3,000	\$ 24,400
2013/2014	\$ 12,050	\$ 9,350	\$ 3,000	\$ 24,400
2014/2015	\$ 12,550	\$ 9,850	\$ 3,000	\$ 25,400
2015/2016	\$ 12,550	\$ 9,850	\$ 3,000	\$ 25,400

Notes:

¹ Includes \$2,200 a year for out-of-pocket expense reimbursements.

² Contingency for new assessment district formation and includes \$500 for out-of-pocket expense reimbursements.

FISCAL IMPACT

There will be no fiscal impact in the current fiscal year. During annual budget development, staff will continue to include sufficient appropriations to cover the maximum yearly compensation for assessment engineering services and levy administration.

STAFF RECOMMENDATION **(Roll Call Vote)**

1. Adopt Resolution Nos. 2011- _____ and 2011- _____ (Exhibits 1 and 2).
2. Approve the amendment to SCI Consulting Group agreement subject to final language approval by the City Manager and City Attorney; and authorize the City Manager to sign the amendment.

Attachments:

- Exhibit 1: Resolution to Initiate Proceeding for the Citywide Landscape and Lighting Assessment Districts
- Exhibit 2: Resolution to Initiate Proceedings for the Parks and Recreation Maintenance Improvement Districts
- Exhibit 3: Amendment No. _____ to the Agreement with SCI Consulting Group for Professional Consulting, Engineer of Work and Levy Administration

RESOLUTION NO. 2011 - _____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MOORPARK, CALIFORNIA, DIRECTING THE PREPARATION OF THE ANNUAL ENGINEER'S REPORT FOR FISCAL YEAR 2011/2012 FOR THE CITY OF MOORPARK, LANDSCAPE AND LIGHTING MAINTENANCE ASSESSMENT DISTRICTS

WHEREAS, the City of Moorpark provides for the maintenance and improvement of street lighting services through the City's Landscape and Lighting Maintenance Assessment Districts; and

WHEREAS, the City Council of the City of Moorpark proposes to continue the specified districts for the fiscal year commencing July 1, 2011, and ending June 30, 2012.

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

SECTION 1. This Council ordered the formation of and levied the first assessments within the City of Moorpark Landscape and Lighting Maintenance Assessment Districts Nos. AD84-2, AD01-1, AD01-2, AD01-3, AD04-01, AD05-01, AD06-01, AD07-1, AD07-2, AD07-3, AD07-4, AD09-01, AD10-01 and AD10-02 (the "Landscape and Lighting Districts") pursuant to the provisions of the Landscaping and Lighting Act of 1972, commencing at Section 22500 of the California Streets and Highways Code (hereinafter "the Act").

SECTION 2. Sections 22620 et. Seq., of the Act provide for the levy of annual assessments after formation of the Landscape and Lighting Maintenance Assessment Districts.

SECTION 3. Within the Landscape and Lighting Maintenance Assessment Districts, the existing and proposed improvements and any substantial changes proposed to be made to the existing improvements are generally described as follows:

Installation, maintenance and servicing of public facilities, including but not limited to one or more street lights, public lighting facilities, landscaping, statuary, fountains, and other ornamental structures and facilities, entry monuments and all necessary appurtenances, debris basins, turf, ground cover, shrubs and trees, irrigation systems, drainage systems, lighting, fencing and any facilities which are appurtenant to any of the aforementioned or which are necessary or convenient for the maintenance or servicing thereof, including irrigation, electric current and energy; and to provide incidental expenses in connection therewith. Services provided include all necessary service, operations and maintenance of the above mentioned improvements, as applicable, for any property owned or maintained by the City of Moorpark.

SECTION 4. SCI Consulting Group is hereby designated as Engineer of Work for purposes of these proceedings and is hereby ordered to prepare and Engineer's Report in accordance with Article 4 of Chapter 1 of the Act and Article XIIID of the California Constitution, for the Districts referred to in Section 1 of this Resolution. Upon completion, the Engineer shall file the Engineer's Report with the Clerk of the City Council for submission to the Council.

SECTION 5. 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 2nd day of February, 2011.

Janice S. Parvin, Mayor

ATTEST:

Maureen Benson, City Clerk

RESOLUTION NO. 2011 - _____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MOORPARK, CALIFORNIA, DIRECTING THE PREPARATION OF THE ANNUAL ENGINEER'S REPORT FOR FISCAL YEAR 2011/2012 FOR THE PARKS AND RECREATION MAINTENANCE IMPROVEMENT DISTRICT OF THE CITY OF MOORPARK

WHEREAS, the City of Moorpark provides for the maintenance and improvement of parks and recreation facilities through the City's Parks and Recreation Maintenance and Improvement District; and

WHEREAS, the City Council of the City of Moorpark proposes to continue the specified district for the fiscal year commencing July 1, 2011, and ending June 30, 2012.

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

SECTION 1. On July 15, 1999, by its Resolution No. 99-1625, this Council ordered the formation of and levied the first assessment within the City of Moorpark Parks and Recreation Maintenance Improvement District (the "Maintenance Improvement District") pursuant to the provisions of Article XIID of the California Constitution, and the Landscaping and Lighting Act of 1972 (the "Act"), Part 2 of Division 15 of the California Streets and Highways Code (commencing with Section 22500 thereof).

SECTION 2. The purpose of the Maintenance Improvement District is for the installation, maintenance and servicing of improvements to the City of Moorpark, as described in Section 3 below.

SECTION 3. Within the Maintenance and Improvement District, the existing and proposed improvements to be undertaken by the Maintenance and Improvement District are generally described as the installation, maintenance and servicing of public facilities, including but not limited to landscaping, sprinkler systems, park grounds, park facilities, landscape corridors, ground cover, shrubs and trees, street frontages, playground equipment and hard court areas, senior and community centers, drainage systems, lighting, fencing, entry monuments, basketball courts, tennis courts, running tracks, other recreational facilities, security guards, graffiti removal and repainting, and labor, materials, supplies, utilities and equipment, as applicable, for property owned and maintained by the City of Moorpark. Installation means the construction of recreational improvements, including but not limited to, land preparation, such as grading leveling, cutting and filling, sod, landscaping, irrigation systems, sidewalks and drainage, lights, playground equipment, play courts, recreational facilities and public restrooms. Maintenance means the furnishing of services and materials for the ordinary and usual maintenance, operation and servicing of said improvements, including repair, removal, or replacement of all or part of any improvement; providing for the life, growth, health and

beauty of landscaping; and cleaning, sandblasting and painting of walls and other improvements to remove or cover graffiti. Servicing means the furnishing of electric current or energy for the operation or lighting of any improvements, and water for irrigation of any landscaping or the maintenance of any other improvements.

SECTION 4. SCI Consulting Group is hereby designated as Engineer of Work for purposes of these proceedings and is hereby ordered to prepare and Engineer's Report in accordance with Article 4 of Chapter 1 of the Act and Article XIID of the California Constitution. Upon completion, the Engineer shall file the Engineer's Report with the Clerk of the City Council for submission to the Council.

SECTION 5. 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 2nd day of February, 2011.

Janice S. Parvin, Mayor

ATTEST:

Maureen Benson, City Clerk

**AMENDMENT NO. 1
TO THE PROFESSIONAL SERVICES AGREEMENT
BETWEEN THE CITY OF MOORPARK
AND SCI CONSULTING GROUP, INC.**

This 1st Amendment to the Agreement for services (Amendment) is made and entered into this ____ day of _____, 2011 (the "Effective Date") between the City of Moorpark, a municipal corporation in the County of Ventura, State of California, hereinafter referred to as "City" and SCI Consulting Group, Inc., a corporation, hereinafter referred to as "Consultant".

W I T N E S S E T H

WHEREAS, on August 26, 2010, the City and the Consultant entered into an Agreement for professional consulting, Engineer of Work and levy administration for the Landscape and Lighting Assessment Districts and the Parks and Maintenance Improvement District for fiscal year 2010-2011; and

WHEREAS, the City and the Consultant wish to amend the Scope of Work, compensation and term provisions of the Agreement.

NOW, THEREFORE, in consideration of the mutual covenants, benefits and premises herein, the parties hereto agree to amend the aforesaid Agreement as follows:

1. SCOPE OF WORK

Section I. Scope of Work, is hereby expanded to include the newly formed Landscape and Lighting Assessment Districts: AD09-01, AD10-01 and AD 10-02; as more specifically described on page 8 of Exhibit A (Proposal), as attached hereto and incorporated herein.

2. COMPENSATION

Section II. Compensation, is hereby amended to increase the full compensation to the Consultant for services and out-of-pocket expenses, as described in the Proposal by an additional \$124,000, not to exceed \$145,400 for the total term of this Agreement. The annual maximum fees to Consultant are as follows:

Fiscal Year	Administration Services		Out-of-Pocket	Contingency ¹	Annual Maximum
	Landscape & Lighting	Parks			
2011/2012	\$ 9,850	\$ 9,350	\$ 2,200	\$ 3,000	\$ 24,400
2012/2013	\$ 9,850	\$ 9,350	\$ 2,200	\$ 3,000	\$ 24,400
2013/2014	\$ 9,850	\$ 9,350	\$ 2,200	\$ 3,000	\$ 24,400
2014/2015	\$ 10,350	\$ 9,850	\$ 2,200	\$ 3,000	\$ 25,400
2015/2016	\$ 10,350	\$ 9,850	\$ 2,200	\$ 3,000	\$ 25,400
Total Increase					\$ 124,000

¹ Contingency for new assessment district formation: \$2,500 for services and \$500 for reimbursable expenses.

The annual fee shall be payable according to the schedule outlined on pages 20-22 of the Proposal, as attached and incorporated herein.

3. TERM OF AGREEMENT

Section IV. Term of Agreement, is hereby extended for an additional five (5) years, ending June 30, 2016, unless sooner terminated or suspended as provided in the Agreement.

With the exception of the changes noted above, all other provisions contained in the Agreement for professional consulting, Engineer or Work and levy administration shall remain in full force and effect.

CITY OF MOORPARK:

SCI CONSULTING GROUP, INC:

Steven Kueny, City Manager

Gerard van Steyn, President

Date

Date

ATTEST:

Maureen Benson, City Clerk

Attachment: Exhibit A – Proposal dated December 16, 2010

PROPOSAL FOR THE

CITY OF MOORPARK

TO PROVIDE

**PROFESSIONAL CONSULTING, ENGINEER OF
WORK AND LEVY ADMINISTRATION**

FOR THE

**LANDSCAPE AND LIGHTING MAINTENANCE ASSESSMENT
DISTRICTS**

**AND THE PARKS AND RECREATION MAINTENANCE AND
IMPROVEMENT DISTRICT**

SUBMITTED BY

SCIConsultingGroup

4745 MANGELS BOULEVARD

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December 16, 2010

Ron Ahlers
City of Moorpark
799 Moorpark Ave
Moorpark, CA

Re: Proposal for providing Professional Consulting, Engineer of Work and Levy Administration of the Landscape and Lighting Maintenance Assessment Districts and the Parks and Recreation Maintenance and Improvement District

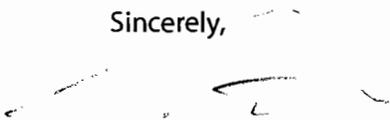
Dear Ron:

SCI Consulting Group ("SCI") is pleased to submit, for your review, the enclosed proposal to serve as the Engineer of Work and provide professional consulting and levy administration services for the City of Moorpark, Landscape and Lighting Maintenance Assessment Districts and the Parks and Recreation Maintenance and Improvement District.

The scope of services within this proposal includes all tasks required for the year-round administration of the Landscape and Lighting Maintenance Assessment Districts and the Parks and Recreation Maintenance and Improvement District for the City of Moorpark, new assessment formations, as well as other value-added services such as comprehensive property base auditing and levy accuracy confirmation on a parcel by parcel basis to ensure that the City receives the maximum possible revenues, a historical review of levy submittals and updating of the current roll data with the final closing roll for the upcoming fiscal year. Moreover, SCI will provide our comprehensive services in a manner that limits the time and resources of the City.

Please review the enclosed proposal, if you have any questions regarding the enclosed, please do not hesitate to call. We look forward to continue working with the City on renewal of the existing assessments as well as formation of new assessments.

Sincerely,



Gerard van Steyn
President

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INTRODUCTION

SCI Consulting Group ("SCI") is pleased to offer our professional consulting, engineering, levy administration and assessment formation services to the City of Moorpark, Landscape and Lighting Maintenance Assessment Districts and the Parks and Recreation Maintenance and Improvement District ("Assessment Districts"). SCI understands that the assessment revenues need to be annually reauthorized and collected in a manner that is legally compliant, accurate and efficient. We also have witnessed that if such assessment administration services are not performed with a comprehensive, intensive and professional approach that includes annually identifying every parcel that should be subject to the assessments and recalculating and verifying the specific amount of assessment for each parcel in the Assessment Districts, the assessment revenues received by the City will not be maximized.

Specifically, our annual scope of services, which will maximize the revenues from the assessments, minimize the City's time and resources needed, and maximize the legal defensibility of the assessments will include:

- Initial planning, property research and assistance with preparation of improvement/service plans and budgets.
- Acquisition of current property data from the County Assessor, other real property information vendors and title companies, comparison of the Assessor data with other property data sources and data accuracy validation services.
- Maximizing assessment revenues and accuracy with custom, hands-on identification of all parcels within the Assessment Districts boundaries and determination of the updated and current property characteristics for each parcel within the Assessment Districts boundaries.
- Maximizing assessment revenues and accuracy by using advanced Geographical Information Systems and parcel layers to confirm that all parcels are included within the assessment rolls.
- Maximizing assessment revenues through comprehensive research and confirmation of all levies on a parcel-by-parcel basis. These services have proven to maximize revenues for every public agency for which we have provided levy administration services.
- Minimizing City time and resources by handling most tasks related to the administration and collection of the assessments.
- Periodic meetings and conferences with City staff to review findings, property base, budgets, and other relevant items.
- Preparation of the annual Engineer's Report for the Assessment Districts. These reports will meet all legal requirements and will provide continued justification for the levies, budgets for levy expenditures by expenditure type, and specific levies for each parcel.

- Preparation of legal notices, resolutions, staff reports and City Council review items.
- Acquisition of the final lien date Tax Collector's property roll for all parcels to be included on the tax roll for the upcoming fiscal year.
- Each year, a full second round of research, identification and validation of all new and existing parcels within the Assessment Districts boundaries to conform to the final Tax Collector's parcel roll for all parcels to be included on the upcoming fiscal year tax roll.
- A full second round of identification of all parcels for which the property characteristics have changed (such as newly developed properties).
- Each year, a full second round of recalculation and confirmation of the final upcoming fiscal year's assessment amount for every parcel within the Assessment Districts boundaries.
- Submittal of the final assessment rolls to the County Auditor/Tax Collector and verification of the final assessment amounts for each parcel to be included on tax bills.
- Levy collection reports and confirmation of the accuracy of the Auditor's Tax Roll for each levy.
- Directly responding on our toll-free taxpayer assistance line to property owner inquiries year round regarding the assessments for their property, the basis for the assessments, the services funded or other questions.
- Providing a program developed specifically for the City that provides easy access and reporting of special assessment and property information.
- Assistance with the administration and collection of the assessment revenues.

OTHER SCI SERVICES

SCI provides many comprehensive services to public agencies, such as funding mechanisms, revenue enhancement studies and financial planning services. The list below includes some of these services.

- **Ballot Measures**
 - Assessment District Formation
 - Special Tax Election
 - 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**
 - 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
 - Land Planning and Real Estate Services

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

QUALIFICATIONS AND EXPERTISE

ABOUT SCI CONSULTING GROUP

SCI provides a broad range of planning, research, engineering, special district administration, revenue measure formation and financing services for local agencies. SCI Consulting Group's team of planning, financing, engineering and computing experts has the expertise to assist in every phase of the assessment administration process, including inception, research and analysis, evaluation of assessment factors, documentation of findings, development of engineer's reports to meet all current legal requirements for annual assessment continuation, identification of all parcels that should be assessed, calculation and verification of the specific assessment amount for each parcel and levy collection and verification.

With over 23 years of benefit assessment, special tax and civil engineering experience, 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 benefit assessments, special taxes and fees and were involved with the cleanup legislation for Proposition 218.

SCI Consulting Group specializes in the administration of assessment districts for public agencies. With over twenty years of experience in this specialized field, we have never missed a levy submission deadline and have an unparalleled track record of finding additional revenues for assessments that were previously administered by another firm. In fact, every case in which SCI has begun to administer a special assessments previously handled by another firm or the County, we have uncovered significant additional revenues due to incorrect previous assessment levies or missing parcels.

For example, in 2004, when we were first awarded the contract for administering the special assessments for the East Bay Regional Park District, we uncovered over \$40,000 per year in additional revenues due to previously incorrectly assessed properties or missing parcels by the previous assessment administration firm.

The Cosumnes Community Services District provides another example of our proven ability to deliver the most accurate and revenue maximized assessments: Prior to 2004, SCI had been providing the assessment administration services for the District. In 2004, however, the District board elected to hire another firm for the assessment administration services because their fee for services was slightly lower than SCI's. In 2008, the District re-assigned the assessment administration services back to SCI because they were becoming concerned about missing or inaccurate assessments. Our analysis of the previous administration work found that the District had missed out on over \$93,000 per year due to incorrect assessment calculations, or missing parcels that should have been subject to the assessments.

Following is a table that summarizes the additional annual revenues we have uncovered for public agencies that previously relied upon another firm or agency to calculate and administer their assessments, fees or special taxes.

Table 1 – Additional Annual Special Levy Revenues Found by SCI

<i>Client</i>	<i>Annual Recovered Revenue</i>
County of Los Angeles	\$226,000/yr
City of Palmdale	\$152,000/yr
County of Sonoma	\$150,000/yr
City of San Diego	\$108,000/yr
Cosumnes Community Services District	\$ 93,000/yr
City of Pinole	\$ 84,000/yr
City College of San Francisco	\$ 50,000/yr
East Bay Regional Park District	\$ 40,000/yr
Mission Oaks Recreation and Park District	\$ 35,000/yr
Loomis Fire Protection District	\$ 33,700/yr
Santa Clara County Open Space Authority	\$ 30,000/yr
North Highlands Recreation & Park District	\$ 30,000/yr
City of Vacaville (Over 100 separate districts)	\$ 25,000/yr
Fairfield-Suisun Unified School District	\$ 25,000/yr
Greater Los Angeles County Vector Control Dist.	\$ 24,000/yr
City of Folsom	\$ 24,000/yr
West Valley Mosquito & Vector Control District	\$ 19,000/yr
Orangevale Recreation and Park District	\$ 17,000/yr
Orange County Vector Control District	\$ 12,000/yr
Owens Valley Mosquito Abatement Program	\$ 10,600/yr
Claremont Unified School District	\$ 10,000/yr
Walnut Creek School District	\$ 9,100/yr
East County Fire Protection District	\$ 8,500/yr
City of Moorpark	\$ 5,000/yr
Easton Community Services District	\$ 1,800/yr

In addition, SCI is a frequent presenter and columnist on assessment ballot proceedings for the American Public Works Association, 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.

TENTATIVE PROJECT TIMELINE

Following is a draft timeline for the fiscal year 2011-12 annual levy administration. SCI can meet this timeline; however, the City can also modify it as needed.

<u>TENTATIVE DATE</u>	<u>TASKS TO BE COMPLETED (PARTIAL LIST)</u>
January	Passage of resolutions directing the preparation of the Engineer's Report.
April 11th	Budgets prepared.
April 18th	Complete and file Engineer's Reports with City.
May 4th	Passage of resolutions of intention to levy annual assessment, preliminarily accepting Engineer's Reports and scheduling the Public Hearing.
May 18th	Publish notices of public hearing (Publish Resolutions of Intention; must occur 10 days before Public Hearing).
June 1st	Public Hearings and approval of resolutions approving Engineer's Reports and levying annual assessments.
July 10th	Submission of assessments to County.
August	Confirmation of final levies with County.

It is understood that all regular meetings of the City Council are on the 1st and 3rd Wednesday of each month.

SCOPE OF WORK – ASSESSMENT ADMINISTRATION

This section outlines the engineering services and other responsibilities SCI would perform as the Engineer of Work and assessment levy administrator for the City of Moorpark.

Definitions:

City:	City of Moorpark, its staff and council.
Existing Assessment Districts:	The City of Moorpark Parks and Recreation Maintenance and Improvement District, AD01-1, AD01-2, AD01-3, AD04-1, AD05-1, AD06-1, AD07-1, AD07-2, AD07-3, AD07-4, AD09-01, AD10-01, AD10-02 and AD84-2 Landscaping and Lighting Assessment Districts
SCI or Engineer:	SCI Consulting Group, and any and all employees.
Administration:	Services related to the determination, levy and collection of tax or assessment revenues.

OVERVIEW OF THE SCOPE OF WORK

This Section shall serve to highlight our approach towards levy administration services and other value added services included within this Proposal.

One of the service elements that distinguishes SCI is our comprehensive approach for levy preparation. On a twice-yearly basis, we recalculate and confirm all of the City's assessments on a parcel-by-parcel basis for all properties within the assessment districts. SCI has developed over fifty unique levy validation/checking queries that we run on each parcel. This approach, while more time consuming than simply relying on Assessor property characteristics and previous levy amounts has consistently proven to result in more accurate levies and higher overall assessment revenues.

The starting point for calculating and confirming the parcel levies for all parcels within the levy district is the current Ventura County Assessor's data. However, we do not simply rely on the County Assessor data alone. Rather, we utilize the County data as the initial basis for establishing the property information and parcel listings for property that will be subject to the assessments. As a next step, we acquire, compare and incorporate additional data and property information from other real property vendors, title company information vendors and other sources. More importantly, we extend and enhance this external property data with our internal proprietary

Statewide parcel attribute and ownership data sets, including over ten years of parcel maps and historical parcel information.

The second foundation block for accurate assessment levies is the identification and verification of every parcel that should be included in the City's assessment roll. SCI has consistently found that the County Assessor's data often contains inaccurate information to identify parcels and property characteristics. Consequently, our approach begins with the County Assessor and State Board of Equalization information regarding parcels within the City boundaries. However, we extend, enhance and confirm this information with several layers of other verification and parcel identification approaches. These approaches, which have consistently been proven to identify other parcels that should be included in the assessment rolls, include using updated and historical parcel maps, GIS layers and a comprehensive parcel-by-parcel research to identify all "child" parcels that were created from a source "parent" parcel after a subdivision or parcel reconfiguration.

Only after a comprehensive evaluation and confirmation of data from multiple sources will we begin calculating and confirming assessment levies. This multi-source approach has proven to maximize the annual benefit assessment proceeds by uncovering inaccuracies and outdated information.

After we have carefully identified and verified each parcel that should be included in the City's assessments and have calculated and determined the levies for each parcel, we will compare our calculated levies for each parcel with the previous year's levy rolls. Every discrepancy and variance with the historical levy data will be researched and confirmed. After this comprehensive research and assessment rate determination work is completed, SCI will develop reports listing each parcel with their upcoming year's assessment amounts.

Furthermore, our proposed scope of services includes periodic on-site meetings, preparation of notices and resolutions, periodic reports for levy submittals and collections, in person attendance at public meetings and the hearing, and taxpayer point of contact services via a toll-free phone number.

DETAILED SCOPE OF WORK

The following section provides a more detailed and bulleted summary of our proposed services.

CONFIRMATION OF ASSESSABLE PARCELS AND LEVY CALCULATION

1. Meet with City staff, City Council, legal counsel and other individuals as needed to establish timeline, assist with development of budgets, review assessment data, and accomplish other tasks related to administration of the Assessments.
2. Utilize SCI's statewide data, including current parcel attributes and historical information for every parcel in the Assessment Districts.
3. Obtain current assessor data from the County Assessor and other sources for all parcels within the Assessment Districts and merge with SCI's internal parcel data.
4. Perform a comprehensive audit to identify each parcel that is physically located within the boundaries of the Assessment Districts. Research and reconcile any parcels that we find to be within the Assessment Districts boundary, but to be inaccurately identified by the County Assessor.
5. Create a complete and highly accurate database including every parcel in the boundaries of the Assessment Districts, including the parcel attributes necessary for calculating the Assessments.
6. Determine the number of parcels in each land use category, excluding nontaxable parcels.
7. SCI maintains complete files of Assessor Parcel Maps for all parcels in the City. Obtain recently updated or revised maps as necessary. Utilize the maps to confirm current parcel attributes and research newly created parcels.
8. Meet with or contact City staff and contact property owners, County Assessor staff and other parties as needed to obtain information or verify Assessments.
9. Research and obtain all property characteristics that are needed to properly calculate the correct assessment amount, including location, property type and land area.
10. Update and maintain a database for each parcel within the Assessment Districts. The data for each parcel will include the owner name(s), site address, property values, parcel number, assessment factors, assessment amount, mailing address, site address, parcel type, notes and other useful or relevant data.
11. On a parcel-by-parcel basis, calculate the specific assessment amount for each parcel.

12. Use the assessment files for the previous fiscal year and structure this historical levy submittal data so it can be used to help compare and analyze the Assessments. Reconcile the assessment data for last year with the Assessment Districts collections to confirm the accuracy of the data.
13. Research changes in property data, property usage, property valuations and assessment changes from the previous year for all parcels within the Assessment Districts. Flag all parcels that require property research to determine the appropriate assessment.
14. Research all flagged parcels as well as those parcels or areas designated by City staff as requiring further research.
15. Research or field check those properties that are flagged for research and for which additional information is needed.
16. Obtain current fiscal year cost information from the City to use as a basis for the cost estimate in the Engineer's Reports and for the budget and cost estimate for each zone of benefit.
17. Project costs based on prior year estimates, actual costs, new or modified services and improvements and other factors. Establish budgets the Assessments based on information provided by the City.
18. Review the budget and cost estimate with the City and finalize the budget after incorporating City input.
19. Using the established assessment methodology, allocate the estimated cost of services, improvements and expenses to all assessed parcels within the boundaries of each zone of benefit within the assessment districts.
20. Run custom-developed queries on the Assessment Rolls to verify and check assessment accuracy for all parcels.
21. Prepare the preliminary Assessment Rolls for the Assessment Districts.

ENGINEER'S REPORTS

1. Carefully evaluate all Proposition 218 developments and legal issues that may have bearing on the Assessments. Make recommendations for upgrades to improve compliance with Proposition 218 and other legal requirements. Review proposed upgrades with City, Council and other parties and incorporate comments as appropriate.
2. Prepare a comprehensive draft Engineer's Reports for the Assessment Districts including historical information, the basis of the assessment, the method of levy, the revenues raised and uses of the funds and the assessment amount for each parcel. The Engineer's Reports will be prepared by John Bliss, a licensed professional engineer certified in the State of California possessing extensive expertise with post Proposition 218 benefit assessments for similar landscaping, lighting and maintenance services/improvements. The Engineer's Reports will fully comply with the provisions of the Government Code, the Streets and Highways Code,

Proposition 218, Articles XIII C and XIII D of the California Constitution and other relevant code sections.

3. Provide draft copies of the Engineer's Reports to the City and review the Report with the City and Council.
4. As necessary, incorporate comments and suggestions.
5. File the final Engineer's Reports with the City.
6. Prepare any needed resolutions and staff reports for the Assessments.
7. Prepare and assist with the publication of any notices for the continuation of the Assessments.
8. Attend City Council meetings, including those at which the Engineer's Reports are approved and the public hearings are held.
9. Present the Assessment Rolls to the Council, summarize the assessment methodology, answer all questions raised and assist in finalizing the project for Council approval.

QUALITY CONTROL AND LEVY RE-VERIFICATION

1. After the close of each fiscal year on June 30, obtain the final lien-date Assessor and Tax Roll from the County.
2. Identify all parcels that are in the Assessment Districts. Create new Assessment Rolls based upon the final County lien roll data.
3. Identify all new or changed parcels that may require an updated or new assessment calculation.
4. Utilize other real property data information services to obtain additional property information, and to verify and confirm Assessments.
5. Research and update all property characteristics that may affect the assessment amounts for each parcel.
6. Recalculate the final Assessments on a parcel-by-parcel basis.
7. Run over 50 checks and validation queries on each parcel to identify any parcels that may require additional research to confirm the appropriate assessment amount.
8. Perform all additional parcel research as necessary.
9. Compare the assessment amount calculated for each parcel with the Assessment Rolls for the previous fiscal year and re-verify Assessments for all parcels for which the assessment amount has changed.
10. Prepare reports of parcels with usecode changes from the previous fiscal year to the current fiscal year, and verify the Assessments for such parcels.
11. Prepare reports of new and deleted parcels from the previous fiscal year to the current fiscal year, and verify the Assessments for new parcels.

12. Finalize the Assessment Rolls, other documents and supporting materials for each Assessment.
13. After the Assessments and supporting documents have been finalized, another special levy administrator at SCI will perform a comprehensive peer review of all assessment calculations, all documentation and reports and the project schedule and deliverables. Any questions or issues raised are fully researched and resolved.
14. Next, a manager at SCI will perform another full review and quality assurance audit of the assessment district to ensure the highest level of accuracy and that all documents and materials needed for collection of the Assessments are in proper order.
15. After all reviews have been performed and all questions resolved, prepare the final Assessment Rolls listing parcel number, owner name, property address, and assessment amount for each Assessor Parcel within the Assessment Districts. Print Assessment Roll sorted by Assessor Parcel Number and owner's name.

DISTRICT INFORMATION, LEVY CONFIRMATION AND DELINQUENCY MONITORING

1. Develop and make available to the City an Internet based website or computer program that will allow City staff to quickly locate parcel data by owner name, parcel number, street address or other requested search criteria.
2. Meet Ventura County assessment roll submission requirements and perform tasks needed to submit the assessment levies.
3. File approved Assessment Rolls with the County Auditor for inclusion of Assessments on current fiscal year tax bills.
4. Verify and validate Auditor's levy data prior to the printing of tax bills.
5. Obtain information regarding delinquencies and unpaid assessments. Issue periodic reports detailing delinquent assessments.

RESPONDING TO PUBLIC INQUIRIES AND APPEALS

1. Provide the County Auditor/Tax Collector and the City with our toll-free 800 phone lines so property owners can directly contact SCI Consulting Group throughout the fiscal year regarding any questions that arise, a review of specific levies, description of procedures and any other issues.
2. Provide the County Auditor/Tax Collector with our web site address to be used as another resource for property owner inquiries and information dissemination.
3. Provide the County Auditor/Tax Collector with a summary and overview of the Assessments and each zone of benefit for Auditor/Tax Collector staff use.

4. Directly and promptly respond to any property owner, staff or other agency inquiries on our toll free assessment assistance phone lines reached by the number: (800) 273-5167.
5. Throughout the fiscal year, research and, if necessary, revise any Assessments which property owners consider to be based upon incorrect information being used to apply the method of assessment. (It should be noted that, due to our comprehensive levy validation procedures, actual revisions are very minimal, if at all.)
6. If any property owners appeal the Assessments for their property, SCI shall investigate the assessment amount and basis for appeal and shall make a recommendation and finding for the City. In the event that the City finds that the Assessments or assessment rate should be adjusted, SCI will adjust the Assessments according to the City's final determination. (Such appeals are very rare.)
7. For any property owner appeals, SCI will coordinate with the City and property owners as appropriate.

DEFENSE AND SUPPORT OF THE ASSESSMENTS

1. Provide a full response and support of the assessments and basis for the assessments to any person who questions the assessments or the legal basis for the assessments.
2. Provide a full response to any questions or issues raised about the assessments.
3. In the event of any legal challenge or petition against the assessments, provide any and all profession, assessment engineering and technical support and defense of the assessments. If such services are required, they would be provided in close collaboration with the City.

ADDITIONAL SERVICES INCLUDED

1. Computer services to convert and compile Assessor data into database format and computer services to format and submit levy data for the County Auditor.
2. Duplication of up to 10 copies of the Engineer's Reports.
3. Computer services to convert assessment data into format required by the County Auditor.

DELIVERABLES

1. A report of parcel and assessment revisions, including new and retired parcels and parcels that have changed in use.
2. Updated Assessment Boundary Diagrams and maps, as needed.

3. A review of the cost estimates, budgets and proposed services and improvements for the upcoming fiscal year.
4. Important updates and enhancements to the assessment justification and Engineer's Reports to address recent Proposition 218 and legal developments.
5. Preliminary Assessment Rolls and Engineer's Reports.
6. Final Assessment Rolls and Engineer's Reports.
7. Resolutions, notices, draft staff reports and other supporting documents for the continuation of the Assessments.
8. Assistance with the public meetings and hearings for the continuation of the Assessments.
9. Final Assessment Roll for inclusion on the fiscal year 2011-12 Tax Roll.
10. Forms and certifications required by the County Auditor/Tax Collector.
11. An electronic copy of the assessment data submitted to the County Auditor/Tax Collector.
12. Confirmation of the final Assessments prior to the issuance of tax bills.
13. A report confirming the final assessment levy amounts.
14. Delinquency reporting.
15. Toll free taxpayer assistance telephone number to be provided to the City, the County Auditor and Tax Collector.
16. Prompt and direct response to taxpayer questions throughout the term of this proposal.
17. Summary information about the Assessments, City and services funded, to be provided to the County Auditor and Tax Collector.
18. Online or computer based software program to view status of the Assessments, parcels and property information within the assessment district and each zone of benefit.
19. Website URL for more information about the Assessments to be provided to the City, the County Auditor and Tax Collector.
20. Periodic reports to the City regarding the Assessments, assessment collections and other developments that may affect the Assessments.
21. Assistance with the preparation, printing and mailing of direct assessment bills for any parcels that are not included on the County Tax Collectors Tax Roll, such as parcels that are traditionally exempt from property taxes.

CLIENT RESPONSIBILITIES

Under the Scope of Services, SCl Consulting Group would handle all services specified in the Scope of Work and any other related services as appropriate for the Levy Administration Services. The City would be responsible for the following:

1. Meet periodically with SCl as required.
2. Provide information and documentation regarding proposed budgets and improvement projects and other information as required.
3. Review resolutions, notices, draft staff reports and other supporting documents by City staff and legal counsel.
4. Assist with the review of all information presented and prepared by SCl.
5. Assist with planning and coordination of action items, scheduling of agenda items and Board meetings.

SCOPE OF WORK – NEW ASSESSMENT FORMATIONS

This section outlines the engineering services and other responsibilities SCI would assume in assisting with the formation of a new landscaping and lighting assessment district. This proposal includes all engineering services, data analysis, project coordination and other related tasks associated with such formation.

Definitions:

City:	City of Moorpark, its staff and council.
Assessment District:	New assessment districts proposed for formation by Petition and Waiver
SCI or Engineer:	SCI Consulting Group, and any and all employees.
Administration:	Services related to the determination, levy and collection of tax or assessment revenues.

Initial Planning and Analysis

1. Meet with City Staff and Council as needed to establish the boundaries to be used, timeline and a description of the work to be performed.
2. As required, meet with any local property owners involved with the formation of the Assessment District to understand their issues and other factors concerning the Assessment District.

Engineer's Report

1. Obtain data from the County Assessor for all parcels within the proposed boundaries.
2. Obtain copies of Assessor Parcel Maps and prepare the Boundary Map and Assessment Diagrams.
3. Research and determine other property information required for benefit apportionment such as assessable land area, number of residential dwelling units, and proximity to improvements to be financed, etc.
4. Analyze the potential tax base and estimate special benefit received by each assessable parcel in compliance with the provisions of Proposition 218. In addition, evaluate and quantify general benefits.
5. Describe the improvements to be financed.

6. Develop cost estimates for improvements and expenses to be paid by the proposed Assessment District.
7. In conjunction with City Staff determine the recommended method of assessment.
8. Using the project cost estimates and the assessment rules, allocate the estimated cost of improvements and expenses to all parcels within the boundaries of the Assessment District based on special benefit received.
9. Prepare an Assessment Diagram for the proposed Assessment District.
10. Prepare the Assessment Roll listing parcel number, assessment number, owner name and assessment amount for each Assessor Parcel within the Assessment District.
11. Prepare an Engineer's Report in compliance with the provisions of Article XIII D of the California Constitution which includes the boundaries of the District, description of improvements, improvement plans, facility locations, benefit analysis, all costs, analysis of general versus special benefit, assessments, assessment diagram and other information and data.
12. If required, attend the public hearing for the proposed Assessment District, respond to all questions and make presentation(s) as required.

Project Administration Throughout Fiscal Year:

1. If the assessments are confirmed by the City Council, perform tasks needed to submit the assessment levy.
2. File approved assessment roll, in the required computer format, with the County Auditor for inclusion on upcoming year property tax bills.
3. Develop and maintain a database for each parcel within Assessment District boundaries. The data for each parcel will include the assessment, parcel number, mailing address, site address, parcel type and other relevant information.
4. Confirm the assessments to be levied by the County Auditor and research and update any assessments as required.
5. Track and confirm assessment proceeds and provide periodic reports to the City.

6. Provide the County Auditor with our toll-free 800 phone line so property owners can directly contact Engineer throughout the fiscal year regarding specific assessments, procedures and any other issues.

Other Responsibilities:

1. Meet periodically with City Staff, City Council, legal counsel, and/or other parties. For such meetings, we will prepare exhibits and other relevant materials.
2. Coordinate the development of administrative procedures with the City Staff.
3. All services will be performed on a timely basis and in accord with a timeline developed in conjunction with City Staff.

Additional Services Included

1. Computer services to convert and compile Assessor data into database format and computer services to format and submit levy data for the County Auditor.
2. Duplication of up to 10 copies of the Engineer's Reports.
3. Computer services to convert assessment data into format required by the County Auditor.

COMPENSATION

In consideration for the performance of the Scope of Work, Engineer shall be compensated as follows:

1) Compensation for assessment administration services as detailed herein for the Landscaping and Lighting Assessment Districts shall be payable as follows:

A. For fiscal year 2011-12:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,000 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2012, the sum of \$2,850 shall be due.

B. For fiscal year 2012-13:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,000 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2013, the sum of \$2,850 shall be due.

C. For fiscal year 2013-14:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,000 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2014, the sum of \$2,850 shall be due.

D. For fiscal year 2014-15:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,500 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2015, the sum of \$2,850 shall be due.

E. For fiscal year 2015-16:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,500 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2016, the sum of \$2,850 shall be due.

2) Compensation for assessment administration services as detailed herein for the Parks and Recreation Maintenance and Improvement District shall be payable as follows:

A. For fiscal year 2011-12:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$3,900 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2012, the sum of \$2,450 shall be due.

B. For fiscal year 2012-13:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$3,900 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2013, the sum of \$2,450 shall be due.

C. For fiscal year 2013-14:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$3,900 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2014, the sum of \$2,450 shall be due.

D. For fiscal year 2014-15:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,400 shall be due.

2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2015, the sum of \$2,450 shall be due.

E. For fiscal year 2015-16:

1. Upon the filing of the Engineer's Reports for City Council consideration, the sum of \$4,400 shall be due.
2. Upon confirmation of the assessment levies with the County Auditor, the sum of \$3,000 shall be due.
3. On January 31, 2016, the sum of \$2,450 shall be due.

3) The total compensation for the Scope of Work – New Assessment Formations shall be \$2,500, for each New Assessment District payable upon submission of the Engineer's Report.

4) Customary incidental out-of-pocket expenses including assessor data, legal notices, travel and meetings shall be billed as incurred. The total amount for such costs shall not exceed \$2,200 for each fiscal year of assessment administration plus an additional \$500 for each new assessment formation, without prior authorization from the City.

Note: All costs associated with this proposal can be financed or refunded by assessment proceeds.