



## **STAFF REPORT**

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### **Adopt a Resolution Authorizing the District Manager to Execute a Professional Services Agreement with MuniFinancial to Provide Fire Suppression Assessment Services.**

August 5, 2004

Honorable President and Directors:

**Summary:** Approval of the attached resolution will engage the services of a special tax consultant for purposes of forming a fire suppression assessment within the Belmont Fire Protection District and levying an assessment thereon subject to voter approval.

**Background and Discussion:** On July 6, 2004, the Board of Directors were provided a verbal report on the efforts to place an assessment measure before the voters. At the conclusion of that meeting, the Board of Directors directed staff to obtain a proposal from the assessment engineering firm to prepare a separate revenue measure for the Belmont Fire Protection District.

In order to proceed with this directive, engagement of a special tax consultant is required. Depending on the Board's decisions, additional professionals may be required.

Amongst other things, the special tax consultant will assist in the following:

- Assessment engineering
- Proposition 218 compliance
- Develop schedules and timelines
- Prepare parcel database
- Analyze options and propose assessments
- Prepare Engineer's Report
- Public workshops and communication
- Attend workshops
- Prepare resolutions
- Protest Ballot administration
- Prepare and mail notices
- Coordinate ballot tally

Consistent with the direction of the Board, staff obtained a proposal engaging MuniFinancial to serve as special tax consultant.

Staff has obtained a preliminary project timeline from MuniFinancial. The timeline shows completing the assessment work in August, mailing the ballot notices in September, holding the Public Hearing in late October and declaring the election results in early November. That timeline is aggressive, subject to change and contingent upon a number of factors, including agreement upon funding requirements, concurrence on assessment methodology and Board adoption of initial resolutions in August.

Clearly, the successful outcome of this measure requires interaction and coordination with the South County Fire Commission and, to a lesser extent, the City of San Carlos. The Fire Commission has met

and is desirous of running a coordinated campaign effort. This can be accomplished by having the Fire Commission set service levels and minimum funding requirements. The respective agencies could be responsible for running their respective campaigns. District staff supports coordination between the Fire District and the City of San Carlos campaigns where it improves voter understanding of the issues.

Approval of the attached resolution will authorize the District Manager to execute professional services agreements with the special tax consultant on a form approved by the District's Attorney. The scope of services is attached for Board review.

Lastly, during the last Council Priority Calendar setting process, a three member sub-committee of the Finance Commission, along with the City Treasurers of Belmont and San Carlos and others, was formed to undertake a special project to consider long term financial alternatives to improve the viability of fire service delivery. For the past several months, this group has been interviewing key personnel and reviewing information related to this subject. On July 29<sup>th</sup>, the sub-committee studied the report prepared by consulting Fire Chief Lowden on South County Fire. At the conclusion of that meeting the sub-committee unanimously recommended moving forward with the fire assessment with a 5-year term, on either a stand-alone or cooperative basis with the City of San Carlos. The recommendations of the sub-committee will be an agenda item for the Finance Commission's meeting on August 5<sup>th</sup>. Any substantive actions forthcoming from that meeting will be provided to the Board orally by staff.

**Follow Up:**

1. Verify and confirm rate calculations.
2. Prepare implementing resolutions.
3. Coordinate election.

**Public Contact:** The sponsoring agencies have been informed of this action.

**Fiscal Impact:** Adoption of the attached resolution commits the Authority to \$24,800, plus expenses. The FY 2005 Budget has sufficient funding appropriated for this purpose.

As part of this action, the Directors are approving a supplemental appropriation for consideration at the FY 2005 Mid Year Review.

**Recommendation:** Approve resolutions engaging the MuniFinancial to serve as special tax consultant.

**Alternatives:** With direction, refer the matter back to staff for further study.

**Attachment:**

1. Resolution of the Belmont Fire Protection District Engaging Professional Services of Special Tax Consultant for Purposes of Forming a Fire Suppression Assessment District.
2. Special Tax Consultant Scope of Services.
3. Preliminary Project Timeline.

Respectfully submitted,

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Thomas Fil, Finance Director

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Dan Rich, Acting District Manager

**RESOLUTION NO.**

**RESOLUTION OF THE BOARD OF DIRECTORS OF THE BELMONT FIRE PROTECTION DISTRICT AUTHORIZING THE DISTRICT MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT WITH MUNIFINANCIAL TO PROVIDE FIRE SUPPRESSION ASSESSMENT SERVICES**

**WHEREAS**, The Belmont Fire Protection District desires to implement a fire suppression assessment district and levy an assessment thereon; and

**WHEREAS**, The Belmont Fire Protection District seeks specialized tax services in connection with the fire suppression assessment district; and

**WHEREAS**, MuniFinancial has responded to the District’s proposal for performing the required services; and

**WHEREAS**, The District Directors approve a supplemental appropriation for this purpose for consideration at the FY 2005 Mid Year Review; and

**WHEREAS**, staff recommends that said firm be accepted by the Board of Directors.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Directors authorizes the District Manager to execute a professional services agreement on a form approved by the District’s Attorney engaging MuniFinancial to serve as special tax consultant for the not to exceed sum of twenty-seven thousand dollars (\$24,800), exclusive of incidentals.

\* \* \* \* \*

I hereby certify that the foregoing Resolution was duly and regularly passed and adopted by the Board of Directors of the Belmont Fire Protection District at a regular meeting thereof held on August 10, 2004 by the following vote:

**AYES, BOARD MEMBERS:** \_\_\_\_\_

**NOES, BOARD MEMBERS:** \_\_\_\_\_

**ABSTAIN, BOARD MEMBERS:** \_\_\_\_\_

**ABSENT, BOARD MEMBERS:** \_\_\_\_\_

\_\_\_\_\_  
**Secretary of the Belmont  
Fire Protection District**

**APPROVED:**

\_\_\_\_\_  
**President of Belmont Fire Protection District**

# PROPOSAL TO PROVIDE FIRE SUPPRESSION ASSESSMENT SERVICES FOR THE CITY OF BELMONT

**JULY 16, 2004**



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July 16, 2004

Mr. Thomas Fil  
City of Belmont  
1070 Sixth Avenue  
Belmont, California 94002

**Re: Proposal to Provide Fire Suppression Assessment Services to the City of Belmont**

Dear Mr. Fil:

MuniFinancial, a member of The Willdan Group of Companies, is pleased to submit the following information regarding our qualifications in the area of fire suppression assessment consulting services. This proposal includes a brief overview of our consulting experience and provides a scope of services and associated fees related to this important project.

We have assembled a team of senior staff to ensure that your project receives the fullest benefit of our experience. I will serve as Principal-in-Charge of the effort; I will be supported by Scott Koppel, Principal Consultant; Robert Quaid, Senior Project Manager, and Jennifer York, Analyst. Team resumes are also included for your information.

We appreciate the opportunity to present our credentials for your review. If you have any questions, please feel free to call me at (800) 755-6864 or e-mail me at [brianj@muni.com](mailto:brianj@muni.com).

Sincerely,

MuniFinancial

A handwritten signature in black ink that reads "Brian Jewett".

Brian Jewett  
Division Manager  
Financial Consulting Services

Enclosure

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# EXECUTIVE SUMMARY

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## Project Overview

We understand that the City of Belmont acting on behalf of the Belmont Fire Protection District is considering the formation of a Fire Suppression Assessment to be imposed on approximately 8,295 parcels serviced by the District. Given the purpose of the assessment and the annual operations and maintenance needs, we believe that a Fire Suppression Assessment is the appropriate legal mechanism to levy special assessments.

## Project Approach

This proposal illustrates our experience with a variety of challenges faced by cities and special districts in California and presents the best possible solution and consultant team. You will note that MuniFinancial has a great depth of knowledge and experience with special assessments in California. Our proposed methods and approaches provide an insight into the practical requirements of assessment implementation efforts, Proposition 218, relevant legislation and case law, as well as strategies to enhance the chances of success for this important project.

## Assessment Engineering

With the passage of Proposition 218, new focus is placed on the assessment methodologies and determination of benefit. This focus, coupled with the new burden of proof provision, has placed new emphasis on technical competency. Our assessment engineers have prepared hundreds of levy reports—giving MuniFinancial the most comprehensive set of assessment methodologies in the industry.

The requirement of a “special” benefit finding distinct from a “general” benefit is not a radical departure from existing practice and case law. However, since many assessment formulas might not withstand the heightened scrutiny likely resulting from Proposition 218, the identification of special and general benefit during the review of existing assessment methodologies is very important. The scope of services we have proposed for you includes review of the improvements to identify general and special benefit.

## Public Workshops and Communication

Effective communication with property owners is essential to a positive outcome of any public hearing and assessment process. MuniFinancial realizes the fact that the district is in place for the benefit of the property owners and that they should enjoy a sense of “ownership.” That sense of ownership (or control) by the property owners is achieved through good listening skills as well as verbal and printed communication.

MuniFinancial approaches all of our workshops entering into a dialogue with the property owners rather than simply informing them of what is about to happen. We are looking for input from them as to what they would like to see from the assessment. In the event we can incorporate their suggestions we have gained them as allies and have developed a team aimed at success.

## **Protest Ballot Experience**

Since the enactment of Proposition 218 in November 1996, MuniFinancial has prepared Engineer's Reports for over 100 separate assessment districts for local governments.

Our clients have discovered the benefits to the entire process of engaging a firm that brings a financial management and planning perspective to the creation of these districts and assessments.

Our ability to consider the needs of all stakeholders in a fire suppression assessment provides our clients with not only a successful formation, but with satisfied constituents and policymakers over time. During the dozens of public meetings and hearings in which we were involved over the past year, we were largely responsible for educating the public on the benefits of the financing mechanism. Our finance-oriented approach successfully met the public's demand for straight answers.

We welcome the opportunity to bring our experience and expertise to the City of Belmont.

## SCOPE OF SERVICES

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We will assist the District in its efforts to present a suppression assessment measure to the affected property owners throughout the fire service area.

### Fire Suppression Assessment Implementation

1. Ensure that any actions taken toward the formation of the assessment will be in compliance with Proposition 218 and applicable California Codes and legislation under which the assessment is to be formed.
2. Prepare a timeline of all pertinent tasks related to the formation process.
3. Provide the District with a checklist of documentation to be reviewed.
4. Prepare and maintain a parcel database of all parcels to be contained within the assessment using parcel information from the City and the County Assessor's Office current secured roll.
5. Prepare a special/general benefit analysis of the proposed assessment to ensure that both benefit factors are separate and distinct and that the general benefit portion is not included in the proposed special assessment. Establish a formula for equitably spreading the assessment based on the special benefits received by each property.
6. Prepare the Engineer's Report for the assessment to include the following items:
  - ◆ A brief description of the assessment and financing structure;
  - ◆ Description of improvements to be constructed and/or maintained;
  - ◆ Budget estimates of costs for construction and/or maintenance of improvements (to be provided by the City or District);
  - ◆ Estimate of assessment to each parcel;
  - ◆ Method of spread; and
  - ◆ A listing of parcels within the assessment and their assessment amounts; and,
7. Prepare and mail the legal notice of public hearing and the protest ballots to conform to all current legislation.
8. Prepare all necessary resolutions regarding the formation and implementation of assessments at the Intent Meeting and the Public Hearing.
9. Coordinate with the City Clerk the tally of all ballots.
10. Attend one (1) Intent Meeting in front of the District Board, (1) Public Hearing in front of the Board, two (2) Board meetings for informational purposes, and one (1) kickoff meeting to initiate the project.

#### **For this project, the City will provide the following:**

- Additional property owner information, on an as-needed basis, related to the mailing of notices;
- Opinions as requested from the City's legal counsel;

- Budget estimates for the proposed assessment district.

## The City of Belmont's Team

**Brian Jewett**, Division Manager of Financial Consulting Services, will serve as Principal-in-Charge of the project. Mr. Jewett will provide technical advice regarding fire suppression assessment methodologies and Proposition 218 requirements and provide overall quality control to the effort.

**Scott Koppel**, a Principal Consultant in MuniFinancial's Financial Consulting Services Group and **Robert (Bob) Quaid**, a Senior Project Manager in the group, will support Mr. Jewett. They will organize and direct all work tasks and review interim work products. They will ensure the project is completed on time and within budget. They will also be the primary client contacts, attend key meetings, and make all presentations.

**Jennifer York** will provide additional analytical support.

Resumes for team members are included in the Appendix.

## **FEE FOR SERVICES**

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We will complete the assessment formation based on the approach and scope of work presented above for a lump sum fee not to exceed **\$24,800**. This fee quote includes all printing and postage expenses for the notice and ballot mailing.

MuniFinancial's fee includes all direct expenses incurred during the course of work. We will invoice the District for our services on a monthly basis. Each invoice will reflect work performed on each respective task for each preceding month.

### **Expenses**

MuniFinancial will be reimbursed for out-of-pocket expenses, at cost. Examples of reimbursable expenses include, but are not limited to, postage, travel expenses, mileage (currently 36¢ per mile) and copying (currently 6¢ per copy). Any additional expense for reports or otherwise from outside services, will be billed to the District at our cost with no overhead markup.

### **Rates for Additional Professional Services**

Charges for additional meetings and consulting with counsel, the City or District, or other parties regarding services not listed in the scope of work above will be at our prevailing hourly rates. Our current hourly rates are as follows.

<b>Title</b>	<b>Hourly Rate</b>
Division Manager	\$180
Principal Consultant	\$145
Senior Project Manager	\$130
Project Manager	\$105
Senior Analyst/Analyst II	\$85
Analyst	\$75
Analyst Assistant	\$65
Property Owner Services Representative	\$50
Support Staff	\$45

## APPENDIX – RESUMES

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### Brian Jewett

Mr. Jewett is the Division Manager of the Financial Consulting Services Group at MuniFinancial. His background is in public administration for state and local government. He specializes in fiscal analysis and financial services to local agencies. Mr. Jewett is one of our lead consultants assisting local agencies with fire suppression assessment implementation, user fee projects, utility rate analyses, special district formations, general and special tax analyses, and Proposition 218 compliance projects.

Prior to joining MuniFinancial, Mr. Jewett gained over five years of experience working for state and local government, including staff positions within the City and County of San Francisco and the County of San Diego and an internship position with the City of Poway, California. He consulted on land use planning issues for communities within the State of Delaware, and was a consultant to the Governor’s Cabinet Committee on State Planning.

Recent studies Mr. Jewett has conducted include:

- ♦ **Georgetown Fire Suppression Assessment Implementation, Georgetown, CA:** Mr. Jewett served as project manager. MuniFinancial provided Fire Suppression Assessment Implementation Services to the Georgetown Fire District. This project took into consideration the annual operations and maintenance needs of the District, Proposition 218, relevant legislation and case law, and delivered possible strategies to enhance the chances of a successful special assessment implementation effort. The assessment passed with a 67 percent “yes” vote of the property owners who returned ballots.
- ♦ **Fire Department Financing Plan and Fire Suppression Assessment Development and Balloting, City of Woodland, CA:** Mr. Jewett prepared a comprehensive Fire Department financing plan for the City which included an analysis of financing mechanisms to fund the City’s needs in the areas of capital facilities, annual operations and maintenance, and vehicle replacement. Mr. Jewett also prepared a fire suppression assessment methodology and rates, Engineer’s Report and notices and ballots in support of a proposed Citywide fire suppression assessment.

- ♦ **West Stanislaus County Fire Suppression Assessment Implementation, West Stanislaus County Fire Protection District:** Mr. Jewett served as project manager. MuniFinancial provided Fire Suppression Assessment Implementation Services to the District. This project took into consideration the annual operations and maintenance needs of the District, Proposition 218, relevant legislation and case law, and delivered possible strategies to enhance the chances of a successful special assessment implementation effort. Mr. Jewett prepared the assessment methodology, Engineer's Report, resolutions, and notices and ballots in support of the assessment.
- ♦ **Special Tax Rate Analysis and Project Management, Public Safety Tax Measure, City of La Quinta:** Mr. Jewett was the project manager for this project. The City engaged MuniFinancial to develop special tax projections and a special tax rate formula to support the annual operation expenses of a third fire station within the City of La Quinta. Mr. Jewett also oversaw the community outreach functions for the City and ensured that all County deadlines are met by the City.
- ♦ **Revenue Consulting Services to Place a Utility Users' Tax on the November 2002 Ballot, City of Cathedral City:** Mr. Jewett prepared and delivered a presentation to City Staff and Task Force members detailing revenue generating options available to the City to enhance the City's General Fund budget and provided strategies to achieve the City's goals. As a result of this effort, the City decided to pursue a Utility Users' Tax on the upcoming November 2002 ballot.
- ♦ **Proposition 218 Consulting Services, Street Lighting District No. 2-1991, City of Oceanside:** Mr. Jewett was the project manager for this project. The City engaged MuniFinancial to review its Street Lighting District No. 2-1991 for the applicability of Proposition 218. Additionally, the City asked Mr. Jewett to review and provide analysis of current District revenues and expenditures and to prepare a 10 year revenue and expenditure projection based on historical District budgets.
- ♦ **Proposition 218 Consulting Services, Landscape Maintenance Districts, City of Oceanside:** Mr. Jewett was the project manager for this study. This study required that Mr. Jewett analyze the current and projected fiscal status of each of the City's Landscape Maintenance Districts. In addition, Mr. Jewett developed a Proposition 218 strategic plan for the City should it decide to re-engineer any or all of the Districts and/or seek assessment increases.

- ♦ **Proposition 218 Strategic Planning Services, City of Indio:** Mr. Jewett was the project manager for this project. Many of the City's Landscape Maintenance Districts faced significant budget deficits and required assessment increases. Mr. Jewett led the public relations campaign for the Districts and prepared all necessary assessment ballot proceeding materials. As a result of these efforts, many of the District assessment increases were approved by the property owners who voted on them.

## **Education**

Master of Public Administration, University of Delaware

Bachelor of Arts, University of California, Santa Barbara

## Scott Koppel

Mr. Koppel is a Principal Consultant within Financial Consulting Services at MuniFinancial. His responsibilities include district formation, analysis of development and changes within districts, public facilities funding analysis, implementation of GASB 34 infrastructure reporting requirements, and other special projects. He has been the project manager on many 1915 Act Fundings and Refundings (including Marks-Roos Pools) and financial consulting projects. He has more than 20 years of experience in financial analysis and accounting.

Noted as an expert in assessment district formation and administration, Mr. Koppel is a frequent speaker at extension courses on assessment districts at the University of California Davis and Los Angeles campuses.

Mr. Koppel is also a key player in marketing and implementing the new Statewide Community Infrastructure Program (SCIP). Developed by the California Statewide Communities Development Agency (CSCDA), SCIP provides access to pooled funding to local agencies and gives developers an incentive to pre-fund fees. A voluntary program, SCIP allows agencies to participate with a single resolution. CSCDA provides all of the administration necessary for running the program.

### Relevant Experience

#### *Undergrounding of Utilities (Including Sewers)*

- ◆ **City of La Cañada-Flintridge:** Mr. Koppel is assisting the City of La Cañada-Flintridge with forming an assessment district for underground sewers in the area of the city designated as Area 3A and 3B. We will prepare the engineer's report and assist in the noticing and property owner balloting, as well as property owner meetings.
- ◆ **City of Rancho Mirage (Clancy Lane):** Mr. Koppel prepared the engineer's report for the formation of the Clancy Lane Utility Undergrounding Improvement District No 30-02. For this \$3.2 million project, approximately \$1.6 million is being assessed to 212 properties within the district. Rates and methods of apportionment among the property owners were calculated based on accepted engineering standards.
- ◆ **City of Rolling Hills:** Mr. Koppel recently finished a feasibility study for the City of Rolling Hills that explained the process of undergrounding the utility lines throughout the city. Due to safety and fire issues, the city was interested placing all of the utility lines throughout the city underground and eliminating overhead lines. In this study, various financing techniques were presented including the formation of an assessment district and preliminary methods of spread were calculated and presented for the city's use.
- ◆ **City of Palm Desert (Silver Spur):** Mr. Koppel assisted the City of Palm Desert in the formation of an Underground Utility District in Area 18. Our affiliate company, Willdan, prepared detailed site plans for each of the properties in the district.
- ◆ **City of La Quinta, Formation of Assessment District 2000-2:** Mr. Koppel provided assessment-engineering services for formation of a proposed assessment district to fund utility underground improvements. Valuation of improvements, in anticipation of the city's GASB 34 compliance, were a part of the many services he and his staff provided.

- ◆ **City of Rancho Mirage, Assessment District No. 2996 (Magnesia Falls/White Sun, Project Manager):** Mr. Koppel was responsible for coordinating with the city and financing team and preparation of the engineer's report, boundary map, assessment diagram, and city council presentations. The district funds \$4,780,000 of sewer improvements for an existing commercial and residential development. The 655 properties in the district consist of single- and multiple-family residential as well as commercial properties. The city contributed \$2 million toward completing the improvements.
- ◆ **City of Carson, Assessment District Formation Dominguez Tech Center West:** Directing the engineer's report preparation, Mr. Koppel was responsible for developing the cost estimate, improvement descriptions, boundary maps, assessment methodology and assessment roll. Willdan continues to assist the City of Carson in the formation of an assessment district for an industrial park that will fund roadway, drainage, sewer, water, and landscaping improvements. By keeping track of these myriad assets and their value, MuniFinancial eases GASB 34 reporting down the line.

### *Landscape and Lighting Districts*

- ◆ **City of Irvine, Citywide Landscaping and Lighting District:** Mr. Koppel was responsible for reviewing methodology and revising to meet Proposition 218 requirements. He prepared ballots and notices, attended city council meetings related to the district, and managed the extensive database work associated with this district with more than 40,000 parcels.
- ◆ **City of Riverbank, Crossroads Landscaping and Lighting District:** Mr. Koppel was responsible for adding a new zone to fund specific parkway landscaping and entry monuments for a new development that will include about 1,200 parcels once developed.
- ◆ **City of Solano Beach (Coastal Rail Trail):** Co-project managers, Scott Koppel and Brian Jewett. The City of Solano Beach is participating with other coastal cities to develop a multi-use pathway known as the Coastal Rail Trail (CRT). A portion of the trail will fall within the boundaries of the city's Municipal Improvement District 33 (MID 33). MuniFinancial assisted the city in deciding to form a new 1972 Act Landscape and Lighting District rather than expanding MID 33 to finance the CRT maintenance. We are providing assessment engineering and balloting services for the project.

### *Assessment Districts*

- ◆ **Santa Fe Springs Street Maintenance District:** The City of Santa Fe Springs and developer Layton-Belling & Associates hired MuniFinancial to form a 1982 Maintenance District as conditioned by the city. Mr. Koppel is project manager.
- ◆ **City of Irvine, Assessment District No. 00-18 (Shady Canyon/Turtle Ridge):** Responsible for directing the engineer's report preparation, Mr. Koppel analyzed the improvements in this 1,600-acre development that consisted of roadway, traffic signal, drainage, sewer, water, and dry utilities improvements in the amount of \$173 million.
- ◆ **City of Irvine, Irvine Assessment District No. 93-14 (Spectrum 6) Formation:** Mr. Koppel assisted in the bonding and computation aspects for the formation of an assessment district to fund street improvements, drainage, utilities, and a fire station for an industrial park.

- ♦ **City of Salinas, Acacia Park Assessment District:** Mr. Koppel was responsible for reviewing the engineer's report, overseeing the balloting, noticing, and public communication tasks. The district includes 193 parcels and will fund \$2.3 million in sewer, street and utilities improvements.
- ♦ **City of La Cañada-Flintridge:** MuniFinacial is assisting the City of La Cañada-Flintridge with preparing and processing a State Water Resources Control Board loan for sewerage a portion of the city. This low-interest rate loan will be matched with an assessment bond to fund sewer lines, easements and incidentals for the northeast section (Area 3) of the city.

## **Education**

Master of Business Administration, California State University, San Marcos

Bachelor of Science, Business Administration, University of Washington

## Robert Quaid

Mr. Quaid is a Senior Project Manager in MuniFinancial's Financial Consulting Services Group. In his position as senior project manager, Mr. Quaid provides project management, procedural support and quality review for the annual administration of community facilities, lighting and landscaping and assessment districts.

With more than 10 years of experience in the public finance industry, Mr. Quaid was associated with the financing team of MuniFinancial's parent company, Willdan, for 7 years as a special district consultant. His experience with Willdan included the formation and annual administration of numerous community facilities, lighting and landscaping and assessment districts. Most notably, he served as project manager for the annual administration of sixteen-community facilities districts for the County of Orange, which levied nearly \$20 million in special taxes annually. Mr. Quaid has also assisted California public agencies in financial recordkeeping, auditing and special tax collection.

Prior to joining MuniFinancial, Mr. Quaid spent 15 years in private industry in the fields of real estate accounting and finance. His experience includes financial statement analysis, asset administration, computer conversion, and reporting to the Securities and Exchange Commission for several public real estate partnerships. Mr. Quaid became a licensed California CPA in 1979.

### Related Experience

#### District Formation

- ◆ City of Irvine AD No. 93-14 Spectrum 6
- ◆ City of Newport Beach Underground AD 79 (Beacon Bay)
- ◆ County of Orange CFDs 99-1, and 2000-1 (Ladera Ranch)
- ◆ City of Garden Grove SLD 99-1

#### Financing Services

- ◆ Assessment District 88-1 Irvine Coast Bond Conversion No. 7 & 8
- ◆ City of Chula Vista, Auditing Services for AD No. 97-2 & CFD No. 97-3
- ◆ City of Los Angeles Fire Safety AD No. 1, Billing and Funds Management
- ◆ City of Orange, Assessment District Cost Accounting
- ◆ City of Seal Beach AD 94-1, Improvement Funds Management and Cost Accounting
- ◆ Town of Paradise, Wastewater Design Assessment District, Funds Audit
- ◆ Port Hueneme, Water and Refuse Enterprise Funds, Historical Cost Analysis

## Annual Administration

- ◆ City of Bellflower LAD No. 70
- ◆ City of Claremont LLD No. LL001
- ◆ City of Cypress CFD No. 1, AD No. 1
- ◆ City of Fullerton A.D. No's. 95-01 & 92-01
- ◆ City of Garden Grove A.D. No. 90-1, LLD
- ◆ City of Hawaiian Gardens LLD
- ◆ City of Laguna Beach A.D. No. 94-1
- ◆ Newport Mesa Unified School District CFD No. 90-1
- ◆ City of Norco A.D. No. 195
- ◆ City of Ontario A.D. No's. 100A, 100B, 100C, 103, 107, 108
- ◆ City of Ontario CFD No's. 1, 4
- ◆ City of Ontario LLD No. 1
- ◆ City of Paramount LD No's. 81-1, 85-1
- ◆ City of Placentia LLD No's. 81-1, 92-1
- ◆ City of Rancho Cucamonga CFD No. 85-1
- ◆ City of San Clemente LLD No. 1
- ◆ City of San Clemente A.D. No's. 85-1, 95-1
- ◆ City of San Fernando LLD
- ◆ City of Santa Fe Springs LLD No. 1
- ◆ City of Seal Beach A.D. No. 94-1
- ◆ City of Seal Beach SLMD No. 1
- ◆ City of Thousand Oaks CFD No's. 1988-1, 1994-1, CFD 1997-1
- ◆ City of Union City Solid Waste Collection Fee
- ◆ County of Orange CFD No's. 86-1, 86-2, 87-1, 87-2, 87-3, 87-4, 87-5A, 87-5B, 87-5C, 87-5D, 87-5E, 87-7, 87-8, 87-9, 88-1, 88-2

## Education

Bachelor of Sciences, Accounting, University of Southern California

## Professional Affiliations

California Society of CPAs

## Jennifer York

Ms. York is an Analyst II in the Financial Consulting Services Group at MuniFinancial. Her responsibilities are wide-ranging and include support of project managers, fiscal analysis via fee studies and coordinating and conducting activities involved with the assessment balloting process. Client interaction also falls under her purview.

Ms. York is also responsible for supporting district formation and assessment re-engineering projects. Her duties include identifying and verifying parcels within district boundaries; researching land use; researching missing data; creating parcel databases and voting tally databases; preparing ballots, notices and envelopes; coordinating printing and mailing; and attending public hearings and tabulating ballots.

Ms. York most recently was a member of MuniFinancial's District Administration Services Group, where her responsibilities included the administration and delinquency management of Mello Roos Community Facilities Districts, Assessment Districts, Landscaping and Lighting Districts, Business Improvement Districts and other special districts.

Ms. York has over nine years of experience in the accounting sector. Her expertise includes cost reduction management, budgeting, manpower utilization, general ledger, billings, accounts receivable, accounts payable, and job cost reporting. Prior to joining MuniFinancial, Ms. York worked as a Systems and Technical Consultant where she designed and implemented new accounting systems, created training manuals and prepared troubleshooting materials for several companies.

### Education

Master of Business Administration, Averett University

Bachelor of Science, Business Administration, University of Mary Washington