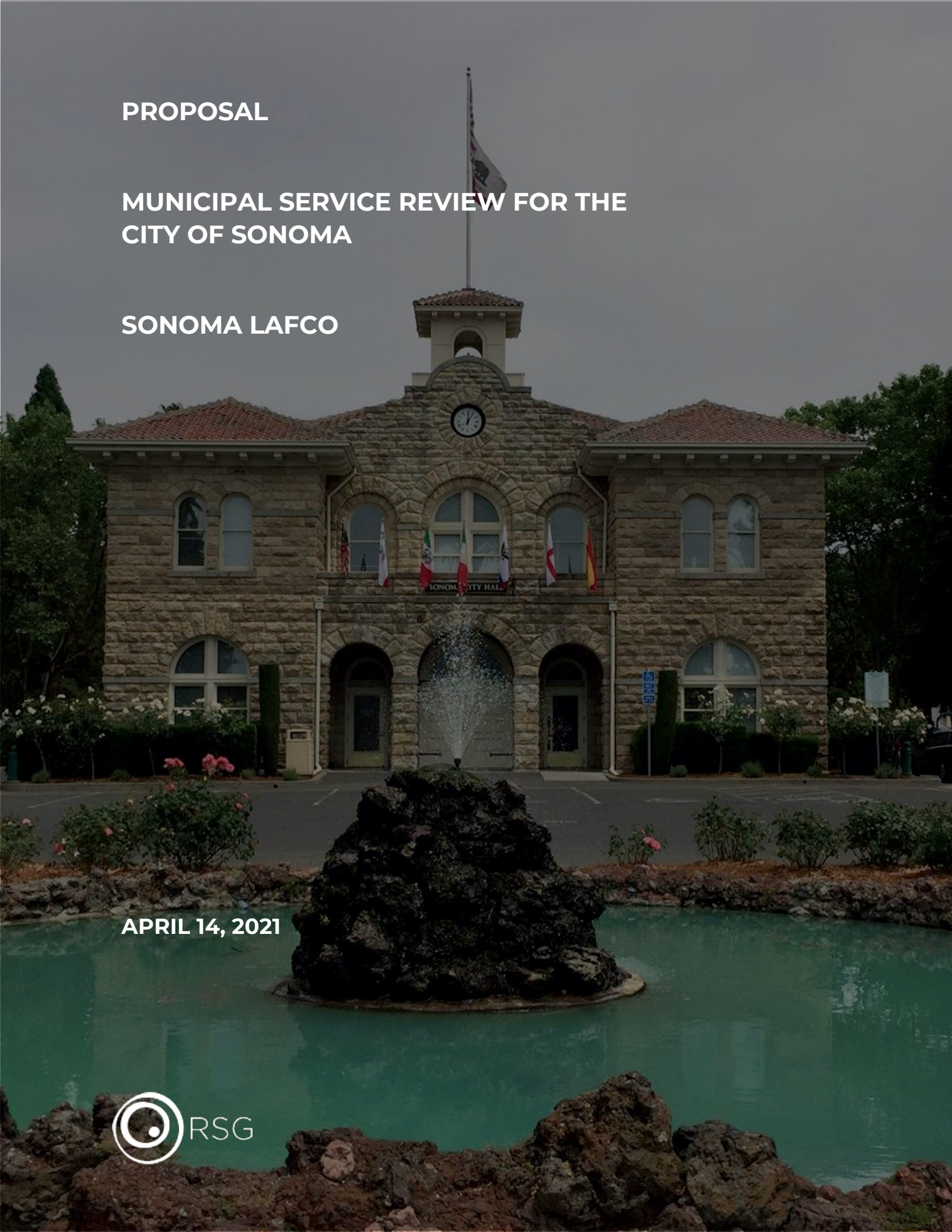


PROPOSAL

**MUNICIPAL SERVICE REVIEW FOR THE
CITY OF SONOMA**

SONOMA LAFCO

APRIL 14, 2021



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April 14, 2021

Via Electronic Mail

Mark Bramfitt, Executive Officer
THE LOCAL AGENCY FORMATION COMMISSION OF SONOMA COUNTY
111 Santa Rosa Avenue, Suite 240
Santa Rosa, CA 95404

Dear Mr. Bramfitt:

In response to your March 9, 2021 email titled "Request for Proposals: Municipal Service Review for The City of Sonoma", RSG is pleased to present this proposal for consulting services to prepare a municipal services review (MSR).

In the past year, RSG has worked on three MSRs, including the MSR and sphere of influence (SOI) update for the cities of La Mirada and Whittier that was unanimously approved recently by LA LAFCO. Last summer, we completed an MSR for the largest dependent special district in California (Consolidated Fire Protection District of Los Angeles County), and we are presently more than halfway through preparation of a MSR for all 28 cities in Riverside LAFCO.

In the preparation of each of these MSRs, we have developed a process that relies first on substantial data collection and analysis from available sources, before reaching out to agencies and stakeholders with focused questions based on our research and analysis. This tends to minimize delays and aids in a more effective and informed data gathering process.

RSG is proud to be an active member of the California Association of Local Agency Formation Commissions (CALAFCO), where I am honored to serve in the capacity as an Advisory member of their Legislative Committee.

Should you wish to discuss any of the information presented, please contact me directly at jjsimon@webrsg.com or by phone at (714) 316-2120.

Respectfully,

Jim Simon, Principal

ABOUT RSG

RSG, Inc. is a California-based, Subchapter "S" Corporation. Founded in 1979, the firm is currently managed by active Principals Jim Simon and Tara Matthews. We maintain three offices in California, including our main office in Irvine and two satellite offices in Berkeley and Vista.

RSG is a creatively charged counterpart to California public agencies. We work with the people responsible for creating vibrant places to accomplish their goals. The inspired leaders at RSG create stronger communities capable of achieving bolder futures by bringing more than four decades of native knowledge to each engagement. As diverse as the agencies we work with, our services span real estate, economic development, fiscal health, and housing initiatives.

MISSION STATEMENT

RSG creates solutions to enhance communities' physical, economic, and social future.

CORE VALUES

Our core values define who we are as people and the standards by which we provide services to our clients. At RSG, we:

- Craft Sincere Relationships
- Only See Opportunities
- Are Driven by Determination
- Make Investments in Ourselves
- Value the Wisdom of our Client

AUTHORIZED CONTACTS

Jim Simon, Principal, is authorized to submit this proposal and execute any contracts or other required documents on behalf the firm as President of RSG, Inc.

CONTACT: Jim Simon, President
RSG, Inc.
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Irvine, CA 92614
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jsimon@webrsg.com

SCOPE OF SERVICES

RSG would prepare a single MSR for the City of Sonoma. We anticipate the process may encompass a 7-9 month work effort from initiation through adoption, including a public hearing and response to comments, if applicable.

RSG excels at finding solutions to difficult and complex issues through fact-based research across many agencies around California. We approach projects with an open mind and determination to uncover one set of facts rather than merely opinions. We are especially adept at taking complex information and synthesizing it into reports and presentations that are appropriate for the audience. We can draw on experience presenting difficult and challenging information to stakeholders, decision makers, and the public.

APPROACH

Our approach would start with a foundational review of the 2006 MSR, followed by the collection of publicly available information from the City and third-party sources such as the State Controller, State Auditor, and the Association of Bay Area Governments. This would include financial statements, budgets, operational documents, applicable shared facility agreements and policies, asset inventories, demographics, fiscal reporting data, Regional Housing Needs Assessment, and other relevant sources. We have developed a service model database system that allows us to coordinate and organize how we compile and sort data in an efficient manner. Our service model database system is then used to develop very specific questions around operational or budget issues, which we then integrate into agency surveys that are conducted face-to-face with agency management. We try to limit the size of data requests for the subject agencies, and use our survey instrument and interviews primarily to gather agency insights and perspectives and to fill data gaps.

As we collect this information, we outline contents for the MSR, providing a second means to identify more questions for follow-up and clarification with participating agencies. Once the MSR is developed, we share the administrative draft via OneDrive for ease of editing and commenting by Commission staff.

Throughout the process, we provide periodic updates (as preferred by staff), maintain and distribute a public and internal schedule of milestones, actions, deadlines, and meeting dates, and collaborate closely with our client. Senior staff, including the RSG Principal, lead this project because we take great pride in our work and want to be assured of our client's satisfaction at all times.

DETAILED WORK PLAN

To prepare the required MSR and SOI determinations and recommendations, RSG will analyze the following areas of relevance:

Municipal Service Review Criteria Detail

- (1) *Growth and population projections for the affected area:* RSG will analyze current and future population and demographic characteristics as related to the service plans and delivery for existing and proposed service areas of the affected agency. Analysis will

include discussion of how the affected agency is planning to meet future needs given any COVID-19 related fiscal challenges, demographic trends, and population projections.

- (2) *The location and characteristics of any disadvantaged unincorporated communities (DUCs) within or contiguous to the SOI:* RSG will rely on Sonoma LAFCO's existing identification of DUCs in the County, which indicate there are no recognized DUCs within the affected City of Sonoma MSR area.
- (3) *Present and planned capacity of public facilities and adequacy of public services, adequacy of public services, infrastructure needs or deficiencies in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence:* We will categorize and analyze existing facility, real property assets, and infrastructure to determine present sufficiency and future requirements.
- (4) *Financial ability of agencies to provide services:* We will conduct an analysis of the present and future capacity of the affected agency to support the current and future servicing needs of the service area.
- (5) *Status of, and opportunities for, shared services:* RSG will analyze existing facilities in the service area for duplication of efforts and to address potential economies of scale to be gained by alternative governance options.
- (6) *Accountability for community service needs, including governmental structure and operational efficiencies:* RSG will conduct a review of the current government structure of the affected agency, including performed audits and the availability of the findings to the public as well as efforts made by the affected agency to encourage public participation and ensure accountability.
- (7) *Any other matter related to effective service delivery, as required by commission policy.* RSG reviewed LAFCO's policies posted online and found some inconsistencies between policy and practice for the City of Sonoma regarding establishment of the SOI and annexation of islands. We will discuss these observations with LAFCO staff prior to proceeding.

TASK 1: PREPARATION AND DATA COLLECTION

RSG will arrange a kick-off meeting with LAFCO staff within ten (10) days of contract commencement. This meeting will cover the collective understanding of the scope of work for the project, project objectives and possible outcomes, assignment or roles and responsibilities, and identify and agree upon the communication methods and frequency that will be expected throughout the duration of the contract.

As part of this meeting, we will review the schedule for preparation of the MSR and SOI update based on the contents of this proposal. Other details may be added, and the schedule would be maintained for use by RSG and LAFCO staff throughout the engagement.

As LAFCO staff knows, collection of GIS, demographic, fiscal, and economic data are critical at this early stage in order for the effective execution of stakeholder interviews and analysis. RSG understands LAFCO has access to Sonoma County GIS shape files, and we would augment this spatial data with the County assessment roll, State Department of Finance demographic data,

the most recently-available fiscal transactions report data from the State Controller's Office, and other information.

Using this information, we will compile a data profile and digital library, and then create a survey instrument to be deployed in advance of stakeholder interviews or other solicitation of input on the services subject to this review .

Timing and work products:

- *May – June 2021*
- *Deliverables: Schedule, maps, compilation of data library, survey instrument*

TASK 2: AGENCY INTERVIEWS AND DATA ANALYSIS

During this task, RSG would be collecting, reviewing, organizing, and analyzing the data, following up with stakeholders, and conducting additional analysis of service models as the data comes in. This includes identifying, characterizing, and quantifying the services provided under contract service agreements, particularly private service providers, and reconciling responses should they provide contradictory information.

RSG would prepare a set of specific questions that may be identified in Task 1 during the data collection and review phase. RSG would request that LAFCO provide an introductory letter not less than 30 days after engaging RSG to inform the agency of the MSR and request their cooperation in our research. Our interview would take approximately one hour and likely conclude the majority of our interaction with the agency until the MSR is provided to them for review.

From the work under Task 1, RSG would develop an expansive database of information from which we would use to develop the MSR. The agency profile would include, at a minimum, the following information:

1. Updating agency profile data including growth and population, finances, and staffing.
2. General financial information, including information on reserves, including an analysis of budgetary General Fund and Restricted Funds and reserve ratios, unfunded pension liabilities, and Capital Asset replacement reserves and funding levels.
3. Assessment of how the COVID-19 crisis has directly or indirectly affected the agency.
4. Recent and planned major capital projects.
5. Population growth anticipated within the agency sphere of influence, possibly corresponding with the ABAG 6th Round RHNA allocations for the cities and county.
6. The extent service providers are able to meet anticipated growth in demand for municipal services in the area of interest.
7. All areas currently receiving municipal services that are outside the existing boundaries.

8. Shared services or any formal Joint Powers Agreements (i.e. agreements, contract between public agencies, public/private partnerships) related to the provision of municipal services.
9. Other relevant programs or facilities managed in a cooperative effort with other agencies.
10. Information on DUCs as required by Government Code Section §56430 (a), paragraph (2) and (3).
11. A summary of information and services available on the agency's website.

Timing and work products:

- July – August 2021
- Deliverables: Summary of responses, agency profile

TASK 3: ADMINISTRATIVE DRAFT AND REVIEW OF MSR REPORT

RSG will prepare an Administrative Draft MSR report for review by LAFCO staff. The report will address the determinations required by CKH Section 56430, and any additional factors/criteria established by LAFCO policy and guidelines. The report will be sent electronically to LAFCO staff for review prior to an (in-person or virtual) meeting to discuss staff's comments and edits. RSG will incorporate comments, edits, and corrections based on staff comments.

The Administrative Draft MSR would achieve the following objectives:

1. Comply with Government Code Section §56430, specifically, to enable the Commission to make a determination with respect to the factors delineated in the statute.
2. Include not only the existing boundary of the agency, but also concentrate on the future planned growth of the area beyond the existing borders, identified as the SOI. Furthermore, the study must include any proposed growth and future annexation proposals contemplated by the agency.
3. Conduct the required analyses in the most cost-effective manner possible.
4. Utilize information that is currently available rather than start new analyses.
5. Utilize key providers in each sub-region to help direct the project.
6. Conduct the service review process in a collaborative fashion with opportunities for input and review by the agency being reviewed.
7. Create a product that will be useful to the Commission in reviewing SOIs and proposals for changes of organization.
8. Create a product that will be beneficial to public agencies as a planning tool.
9. Create a product that will allow practical direct comparison between agencies offering similar services.

10. Have all published work products be readily accessible to, and easily understandable by, the public.

Timing and work products:

- August – September 2021
- Deliverables: Administrative Draft MSR

TASK 4: PUBLIC REVIEW MSR

RSG will prepare a Public Review MSR report with updated information addressing comments received. An electronic copy will be sent to LAFCO staff for final review and distribution.

RSG will attend a Commission meeting to provide a summary presentation of the report, discuss issues and concerns, and respond to questions.

Timing and work products:

- October 2021
- Deliverables: Public Review MSR

TASK 5: FINAL MSR

RSG will prepare a comment log and incorporate comments, edits, and corrections from the Commission, affected agency, and the public for the Final MSR it to the LAFCO staff for distribution to the Commissioners.

RSG will attend a Commission meeting to provide a summary presentation of the final report, discuss issues and concerns, and respond to questions. Upon approval, RSG will transmit one electronic version of the final-approved report to LAFCO staff.

Timing and work products:

- November – December 2021
- Deliverables: Final MSR

QUALIFICATIONS & EXPERIENCE

For RSG, Fiscal Health is about more than just numbers – it’s about community livelihood. Think of fiscal health as the oxygen of a community. A local government with a robust fiscal health is able to fully function to meet the needs of its residents and businesses, while on struggling must meet the same demands but with limited capability.

Either way, RSG strives to add clarity when performing our fiscal health services. Our staff recognizes value in presenting financial data that is not only accurate, but insightful to decision makers, be they investors in municipal financings, elected officials weighing the consequences in the policy choices available, or the public seeking transparency in a complex manner in which local services are funded.

Communities need to be served by their local government as this is not just a luxury, it is a right. Having worked with a variety of communities, we see those that suffer from a lack of resources strive to rise above their circumstances and find resolution. Underprivileged cities lack the financial resources required to help build and sustain communities capable of offering their residents amenities like municipal services, senior services, economic development programs and affordable housing, among other basic needs. Through our fiscal health services, we strive to pave the way for those communities and help them obtain access to the same services as communities who do not face those same struggles. Our overall goal is to help empower Cities by providing them with the tools they need to help their communities thrive and have access to the resources needed to secure sustainability and quality of life.

PREPARING MUNICIPAL SERVICE REVIEWS AND SPECIAL STUDIES

RSG has provided cutting-edge solutions for local government agencies, including outsourcing, shared service studies, and long-range fiscal planning. We have helped LAFCOs develop policies for island annexations and have worked with cities on crafting a viable path in delivering services to areas in their sphere of influence. We have helped cities understand how they need to restructure the services they deliver, and the manner in which they evaluate how they will take discretionary actions in the future. With our assistance, our clients have been able to instill more fiscal discipline at all levels of their organization, become more effective, and have staff engaged in identifying solutions that meet the strategic needs of their community.

Throughout various project engagements, we have both participated in and observed how MSR’s have unfolded, including changes to the MSR statute and how LAFCOs have implemented MSR’s in a variety of manners. In some situations, a lack of growth pressure or lack of significant changes in service levels do not warrant an extensive review and a “checklist” approach is sufficient to reaffirm an existing SOI. In other situations, a comprehensive, in-depth analysis of demographic trends, financial data, infrastructure capacity/conditions, rate structures, service extension barriers for “disadvantaged unincorporated communities,” and shared service delivery alternatives is warranted to lay the groundwork for SOI updates and/or imminent changes of (re)organization. And in other situations, there may be a political minefield and the MSR is a necessary tool that allows LAFCO to play independent facilitator and evaluator and bring parties together around common data and agreement points.

EVALUATING REORGANIZATION, ANNEXATION OR INCORPORATION PROPOSALS

Occasionally, how communities deliver services goes beyond the capacity of the agencies responsible for those services today, and local government and LAFCOs engage RSG to assist in the independent review of the fiscal and operational implications of proposals to annex,

incorporate or reorganize local agencies. RSG has significant experience in providing extensive analysis of the potential municipal impacts associated with annexation and reorganization. RSG first seeks to understand the merits of the primary assumptions behind the prospect. Second, RSG reviews the major cost areas that are not a revenue offset, outlining more realistic approaches to projecting these costs. We conclude the study with final suggestions obtained from conducting a preliminary review of the costs and benefits associated with annexing or reorganizing.

RSG's work products have led to many successful changes in local agency organization and withstood scrutiny of the public, decision makers, and even the State Controller.

EFFECTIVE REDEVELOPMENT DISSOLUTION

With our extensive and deep background in redevelopment, RSG is proud that we are trusted advisors to more successor agencies than any other firm in the state. In this capacity, we work as an efficient extension of staff, providing technical, management, and administrative services. This includes preparation of PPAs and ROPS, as well as staff reports, resolutions, cash flow statements, and presentation material. We often present these items to decision makers on behalf of clients, making the burdensome and often confusing process easier on a finance department. In addition to efficiency, we also offer a wide variety of expertise in working with so many agencies enabling RSG to provide insights and suggestions to meeting a successor agency's specific and often unique needs effectively.

HELPING SECURE FINANCING

Often as an extension of our expertise with tax increment financing and successor agencies, RSG performs fiscal consulting and continuing disclosure services for many of our clients. Since 1979, RSG has served as an independent fiscal consultant on over 235 tax allocation bonds and similar financings, representing over \$5.8 billion in debt issued or refunded.

As one of our founders Kathy Rosenow once said, "Anyone with a computer can prepare revenue projections". We are experienced in preparing tax increment revenue projections that delineate taxing agency payments, administrative costs, project funds, and bonding capacity. RSG knows the nuances and importance of each assumption and variable. That can make a big difference when it comes to sizing a bond and getting the best interest rate and reducing costs of issuance.

After bonds are issued, RSG prepares continuing disclosure reports on behalf of our clients. Given our familiarity with the underlying data sources and required components, RSG can cost effectively ensure compliance with your financial reporting requirements. RSG also acts as a Dissemination Agent, posting the Annual Report for the FY and if needed, filing a notice of significant events to the Electronic Municipal Market Access database.

STUDYING FISCAL IMPACTS

Fiscal stability is one of the key drivers for revenue and expenses available to communities. The road to achieving financial efficiency often starts with fiscal impact analysis and forecasting, be it for a city, a department or division, or a specific development project. RSG's financial projection services have been used to develop long-range fiscal studies to ensure that the General Plan build out is economically feasible, develop short-and-long range budget forecasts, and develop program strategies.

Fiscal impact analysis is used to inform communities about the implications of discretionary approvals of development proposals, provide a data-driven foundation for incentivizing

investment when necessary, as well as empower decision makers to have a basis for community benefit negotiations, often needed more than ever to mitigate gentrification risks. Our models allow the public and private sector to collaborate on viable solutions where needed beyond the ribbon cutting.

EXPANDING FINANCIAL CAPACITY

Because not all communities enjoy the benefits of a robust economy all the time, RSG is asked to assist in finding new sources of financing for projects and entice more private investment into communities. RSG can also identify potential financing and funding sources for various projects and programs that need to be implemented. These activities include identifying and researching the feasibility of obtaining grants, creating programs and incentives for local investment, and negotiating and devising public-private partnerships.

Finally, RSG helps our clients understand today's "alphabet soup" of tax increment financing options: EIFD, CRIA, AHA, NIFTI, and others to ascertain which of these is right for your community. We prepare feasibility studies to estimate the potential capacity, costs, and benefits, while showcasing the need for critical partnerships with other taxing agencies to make these resources more bountiful. We draw upon our 4 decades of experience in tax increment financing plus expertise in the current financing tools to help you decide which of these may best fit your communities' needs.

CONSULTING TEAM RESUMES

This project would be overseen by Jim Simon. Mark Sawicki, Director, who lives and works in the Bay Area, would serve as project manager and will lead the day to day preparation of the MSR. Kyle Westra, Analyst, would be responsible for data collection and analysis, with support from Brandon Fender, Associate, and other RSG staff members as necessary.

Resumes follow this page.



JIM SIMON

Principal & President

714.316.2120
jsimon@webrsg.com

PROFILE

“With determination and imagination, I serve myself and others to discover our capacity for what is possible by designing solutions for a complex world so we can cherish and nurture our communities.”

OUT & ABOUT

CALED 40 at 40 Honoree for contributions to California Economic Development

Co-Chair, CALED EDFRE Technical Committee

Member, CALED Legislative Committee

“Business Retention and Attraction” – Advanced Certification Program Instructor (CALED)

“Community Economic Development” – Keys Program

ABOUT JIM

Inspired to improve the Golden State in his work, Jim delivers intelligence, innovation and passion to projects requiring his unparalleled expertise in fiscal health, real estate and economic development. For over 30 years, Jim is proud to have led projects that have resulted in the investment of over \$10 billion in private and public capital, transforming cities and communities across California. As President of RSG, Jim is helping to shape the next generation of the firm’s legacy - leading RSG’s team of inspired, creative and insightful consultants that serve over 100 communities each year.

EDUCATION

Jim joined RSG in 1991 and has served as a Principal and shareholder since 2001. He received a BA in Business Administration with a concentration in entrepreneurial management from California State University, Fullerton.

In 2014, Jim was selected as an Advisory Board member of the California Association for Local Economic Development, where he serves as Co-Chair of CALED’s Economic Development, Real Estate and Finance technical committee. Jim is also an Advisory member of the Legislative Committee for the California Association of LAFCOs (CALAFCO), and active in other professional organizations including NAIOP, ICSC, NPH, and SCANPH.

RECENT ENGAGEMENTS

Prepared the 2020 Municipal Services Review and SOI Update for the Consolidated Fire Protection District of Los Angeles County, the largest special district in California, for LA LAFCO.

Led review of assessment forecast methodology undertaken by the Los Angeles County Auditor Controller’s office, as well as a follow-up review of reassessment methodology.

Prepared fiscal impact analysis for several annexations proposals within city SOIs, including Martinez, San Carlos, and Belmont.

Served as engagement manager for the most recent incorporation comprehensive fiscal analysis (Olympic Valley, Placer County) in which RSG’s work withstood substantial public scrutiny including DOF review.





MARK SAWICKI

Director

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PROFILE

"I am at my best solving complicated problems, being both logical and innovative, creative and inventive, as I seek to understand, enhance, and improve programs, policies, systems and organizations for the benefit of California communities."

OUT & ABOUT

Urban Land Institute (ULI)

San Francisco Planning and Urban Research (SPUR)

Municipal Managers Association of Northern California (MMANC)

San Diego Housing Federation

California Association for Local Economic Development (CALED)

Non-Profit Housing Association of Northern California

SCANPH

ABOUT MARK

Mark seeks to understand complex matters through analysis, synthesizing and summarizing information, developing effective, efficient, and pragmatic policy solutions, and presenting them in clear and persuasive ways. Mark has forged a unique 30+ year career across both the public and private sectors, from real estate asset management and small business startups to economic and community development, which informs his approach to municipal consulting services.

EDUCATION

Mark joined RSG in 2020 after leadership roles in economic development, community development, workforce development, and housing in the cities of Oakland, Vallejo, and San Carlos. He had previously consulted for cities, counties, and redevelopment agencies with Seifel Consulting based in San Francisco. Mark was appointed and served five years on the Housing Advisory Commission with the City of Berkeley. Earlier in his career he managed a national portfolio of real estate limited partnership investments and co-founded an outsourced financial consulting and accounting firm.

He earned a Masters in Public Policy from the Goldman School at the University of California, Berkeley, and a BS in Finance, cum laude, from New York University.

RECENT ENGAGEMENTS

Conducted a Municipal Services Review and Sphere of Influence update for 28 cities for Riverside County LAFCO.

Provided economic and community development assistance to the City of Belmont including business surveys, website enhancements, and affordable housing project review and underwriting.

Negotiated for the acquisition, sale, lease, and development of property for more than 15 public/private development projects aggregating over 2500 homes and 2 million square feet of commercial space.

Advanced redevelopment and base reuse plans for the former Mare Island Naval Shipyard in Vallejo.





BRANDON FENDER

Associate

714.316.2116
bfender@webrsg.com

PROFILE

“I enjoy creating equitable and sustainable urban space for communities. I thrive in a challenging environment and seek to provide innovative solutions.”

OUT & ABOUT

International Council of Shopping Centers

San Diego Housing Federation

Non-Profit Housing Association of Northern California

SCANPH

ABOUT BRANDON

Brandon specializes in providing support in real estate feasibility, economic and fiscal impact analyses, and housing administration. He is most engaged when his research translates to solutions for local governments and access to healthy and safe environments for their citizens.

In 2014, Brandon became an entrepreneur, starting the Good Beer Company, the first brewery and tasting room in Santa Ana. After five years of success from concept, to business plan and fundraising, to opening a warehouse location, Brandon sold the brewery and returned to RSG, with a direct appreciation for the life of the small business owner which he applies to his work at the firm.

EDUCATION

Mr. Fender initially joined RSG in 2009 while attending the University of California, Irvine where he earned a BA in Social Ecology. As a member of numerous project teams, Mr. Fender gained experience in housing administration, economic and market analyses, housing construction and development, municipal finance, and development feasibility.

RECENT ENGAGEMENTS

Evaluated the feasibility of a culinary business incubator for the City of Los Angeles Economic and Workforce Development Department that considered various business operating structures and subsidies for low-income entrepreneurs.

Developed a methodology for a Municipal Service Review for the Los Angeles Local Agency Formation Commission that sought to inform service and sphere of influence recommendations for a joint sphere of influence between the cities of Whittier and La Mirada.

Completed an economic and market analysis for the City of Carlsbad's comprehensive General Plan update that sought to understand projected changes in job, economic base, retail, shopping, hotel and tourism, and business climate trends over a 30-year period.





KYLE WESTRA

Analyst

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PROFILE

"I am excited to help cities create communities that are economically viable, intellectually and culturally diverse, and full of fulfilling opportunities for all its residents."

OUT & ABOUT

Non-Profit Association of Northern California

SCANPH

San Diego Housing Federation

ABOUT KYLE

Kyle joined RSG in 2019 with a background in housing and economic development research and planning experience. He has performed country wide land-use regulation and home value research as well as local municipal code analysis and research. He embraces a constant search for knowledge and best practices to apply to his projects.

EDUCATION

Kyle holds a Bachelor's Degree in Economics from Saint John's University in Minnesota along with a Minor in Political Science. Kyle's educational background has provided him with quality research, analysis, and technical skills as well as well-rounded abilities to approach new projects or ideas.

RECENT ENGAGEMENTS

Taken part in compliance monitoring, physical inspections, and file audits for affordable housing developments in the City of Chula Vista.

Completed research on inclusionary fees and city permitting software for the City of South Gate.

Assisted in the provision of interim staffing services for the City of Carson mobile home rent control program.

Analyzed fire services in an MSR for LA County LAFCO by applying spatial analysis and GIS tools.

Drafted Development Impact Fee reports and tables for the City of Hawthorne.

Prepared maps for an Economic Development Action Plan report for the City of Belmont.

Engaged in the broker services for a group of properties in the City of Pinole working with potential buyers and City staff alike.



REFERENCES AND CASE STUDIES

The projects below demonstrate the collective experience and expertise of the team members assembled for this proposal. We encourage you to contact our references or follow up with additional questions.

MUNICIPAL SERVICE REVIEW & SPHERE OF INFLUENCE UPDATE OF THE CONSOLIDATED FIRE PROTECTION DISTRICT OF THE COUNTY OF LOS ANGELES - LA LAFCO

RSG was retained by the Local Agency Formation Commission for the County of Los Angeles in 2019 to perform a Municipal Service Review and Sphere of Influence update for the Consolidated Fire Protection District of the County of Los Angeles and their identified affected agencies. RSG is currently reviewing each agency's sphere of influence area in accordance with California Government Code Sections 56425 and 56430 and LAFCO's local guidelines. The MSR will be designed to: (1) meet the requirements of the law for LAFCO to conduct periodic MSRs and SOI updates, specifically with respect to the urban and rural fire protection services provided by CFPD to existing local agencies and five possible fee-for-service agencies (La Verne, Manhattan Beach, Redondo Beach, San Gabriel, and Vernon).

CONTACT: Paul Novak, Executive Officer

AGENCY: Local Agency Formation Commission for the County of Los Angeles

ADDRESS: 80 South Lake Avenue, Pasadena, CA, 91101

EMAIL: pnovak@lalafco.org

PHONE: 626.204.6500

TERM: Completed July 2020

MUNICIPAL SERVICE REVIEW AND SPHERE OF INFLUENCE UPDATE FOR THE CITIES OF LA MIRADA AND WHITTIER - LA LAFCO

RSG was retained in 2020 by the Local Agency Formation Commission for the County of Los Angeles to provide Municipal Service Review and Sphere of Influence updates for the cities of La Mirada and Whittier. RSG is currently reviewing each agency's sphere of influence area in accordance with California Government Code Sections 56425 and 56430 and LAFCO's local guidelines. The MSR will be designed to: (1) meet the requirements of the law for LAFCO to conduct periodic MSRs and SOI updates, specifically with respect to the following services: animal control, broadband, building/planning, law enforcement, library, lighting, parks & recreation, solid waste, streets/roads, storm water, and utilities (including gas, electricity/community choice aggregation). Our MSR/SOI updates will not address water, wastewater, and fire/emergency services as these were recently addressed in separate 2nd round updates for the cities.

CONTACT: Paul Novak, Executive Officer

AGENCY: Local Agency Formation Commission for the County of Los Angeles

ADDRESS: 80 South Lake Avenue, Pasadena, CA, 91101

EMAIL: pnovak@lalafco.org

PHONE: 626.204.6500

TERM: Completed March 2021

MUNICIPAL SERVICES REVIEW & SPHERE OF INFLUENCE UPDATE FOR 28 CITIES – RIVERSIDE LAFCO

RSG was engaged in 2020 to prepare a MSR for all 28 cities in Riverside County. Our work entailed collection and analysis of budget, audit, and operational data, including developing agency profiles by function and service provider/model. RSG interviewed executive staff of the 28 cities and is writing the Administrative Draft MSR, which is scheduled to be provided to LAFCO staff for internal review in May 2021.

CONTACT: Crystal Craig, Assistant Executive Officer
AGENCY: Riverside LAFCO
ADDRESS: 6216 Brockton Avenue, Suite 111-B, Riverside, CA 92506
EMAIL: ccraig@lafco.org
PHONE: 951.369.0631
TERM: Commenced November 2020, scheduled for completion Fall 2021

ANNEXATION FISCAL IMPACT ANALYSES – CITY OF BELMONT

RSG has completed one and is currently working on a second fiscal impact study for the City of Belmont in San Mateo County. The fiscal impact studies assess the recurring revenue and costs associated with providing municipal services for infill redevelopment projects in the Harbor Industrial Area within the City's SOI and are instrumental in the negotiation of a sales tax split with the County. One study was completed in 2018 and a second annexation study should be completed in late March 2021.

CONTACT: Jennifer Rose, Economic Development and Housing Manager
AGENCY: City of Belmont
ADDRESS: One Twin Pines Lane, Belmont, CA 94002
EMAIL: jrose@belmont.gov
PHONE: 650.595.7453
TERM: Second study underway, scheduled for completion in late March 2021

ANNEXATION FISCAL IMPACT ANALYSES – CITY OF MARTINEZ

RSG is finalizing an update and expansion of a prior annexation study for the City of Martinez. The current study evaluates the majority of the City's SOI consisting of four separate study areas within unincorporated Contra Costa County. Due to an unfavorable master property tax exchange agreement, annexation has been impeded previously and the City sought to see if circumstances had changed materially with the ongoing update. RSG's projection considered the effect of city service standards into the SOI and the overall implications on the City's General Fund.

CONTACT: Michael Chandler, Assistant to the City Manager
AGENCY: City of Martinez
ADDRESS: 525 Heniretta St, Martinez, CA 94553
EMAIL: mchandler@cityofmartinez.org
PHONE: 925.372.3517
TERM: Scheduled for completion in late March 2021

OLYMPIC VALLEY COMPREHENSIVE FISCAL ANALYSIS - PLACER LAFCO

RSG was retained by Placer LAFCO in 2015 to prepare a comprehensive fiscal analysis for the incorporation of Olympic Valley, located in eastern Placer County near Lake Tahoe. The fiscal analysis entailed evaluation of a particularly unique community – one with a very small permanent resident population (less than 1,000 full-time residents) and a very large seasonal population (by some measures at least 10,000), coupled with a relatively substantial expansion of the Squaw Valley Resort with additional lodging, commercial, and recreational uses that was concurrently being processed by the County Planning Department. The fiscal analysis concluded that the Town would not likely be feasible for incorporation for many reasons, which led to several contentious meetings with a divided community. Unique to this process was a pre-emptive request for the CFA review prior to the public review draft being released to the public. The State Controller upheld the CFA findings after which the incorporation proponents withdrew their application for incorporation.

CONTACT: Kris Berry, Executive Officer
AGENCY: Placer LAFCO
ADDRESS: 110 Maple Street, Auburn, CA 95603
EMAIL: kberry@placer.ca.gov
PHONE: 530.889.4097
TERM: 2015-2016

COST & OTHER INFORMATION

RSG is estimating a total budget not to exceed \$35,000, inclusive of the hours and expenses pursuant to our Billing Rate and Fee Schedule. The assignment would be billed on a time and materials basis, so actual cost may be less than the not to exceed budget. Additional services outside the scope of work may require a contract amendment.

Our Billing Rates are as follows:

Principal / Director	\$ 235
Senior Associate	\$ 180
Associate	\$ 160
Senior Analyst	\$ 135
Analyst	\$ 125
Research Assistant	\$ 110
Technician	\$ 75
Clerical	\$ 60

RSG does not charge clients for travel or mileage (except direct costs related to field work/surveys), parking, standard telephone/fax expenses, general postage, or incidental copies. However, we do charge for messenger services, overnight shipping/express mail costs and teleconferencing services. We also charge for copies of reports, documents, notices, and support material more than five (5) copies. These costs are charged back at the actual expense plus a 10% surcharge.

RSG issues monthly invoices payable upon receipt, unless otherwise agreed upon in advance. Invoices identify tasks completed to date, hours expended and the hourly rate.

A budget detail and workflow schedule is presented on the following page.

BUDGET AND SCHEDULE BY MONTH		TOTAL	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
CITY OF SONOMA MSR - SONOMA LAFCO										
Task 1 Preparation and Data Collection										
	a Attend Kickoff Meeting and Circulate Final Project Schedule	\$ 6,345	\$ 1,865	\$ 4,480						
	b GIS Mapping: Collect Files and Generate Base/Asset Maps of Agencies, SOIs, and DUCs		4							
	c Data Completion / Prepare Survey (Audits, Budgets, Population, Etc)		8	24						
	d Stakeholder Meetings (3 Locations TBD)									
	e Draft, Circulate, and Finalize Survey Instrument			6						
	Task 2 Agency Interviews and Data Analysis	\$ 9,020			\$ 6,420	\$ 2,600				
	a Distribute, Collect, and Analyze Surveys to Agencies				14					
	b Research, Collect, Analyze, and Reconcile Third-Party Data with Agency Responses			18						
	d Coordination with Agency Representatives, Third-Parties, LAFCO on Data Refinement			10						
	e Tabulate Results, Analyze, and Verify Data with Agencies and LAFCO				17					
	Task 3 Administrative Draft MSR	\$ 11,930				\$ 4,040	\$ 7,890			
	a Prepare Screencheck (Administrative) Draft MSR					25	24			
	b Review and Revisions with LAFCO Staff						18			
	Task 4 Public Hearing Draft MSR	\$ 4,070						\$ 4,070		
	a Stakeholder Meetings (3 Locations TBD)							18		
	b Finalize Public Review MSR a							4		
	c Preparation and Presentation									
	Task 5 Final MSR	\$ 3,600							\$ 2,160	\$ 1,440
	a Prepare Final MSR including Response to Comments Section								12	
	b Preparation and Presentation									6
	c Delivery Final MSR to LAFCO									2
TOTAL FEES		\$ 34,965	\$ 1,865	\$ 4,480	\$ 6,420	\$ 6,640	\$ 7,890	\$ 4,070	\$ 2,160	\$ 1,440
Total Hours		210	12	30	42	42	42	22	12	8