



Proposal to Provide MUNICIPAL SERVICE REVIEW AND SPHERE OF INFLUENCE STUDY FOR WINDSOR WATER DISTRICT AND THE AIRPORT/LARKFIELD/ WIKIUP SANITATION ZONE OF SONOMA WATER

MAY 24, 2024



webbassociates.com

Prepared for:
Sonoma LAFCO





May 24, 2023

Mark Bramfitt
Executive Officer
Sonoma Local Agency Formation Commission
111 Santa Rosa Avenue, Suite 240
Santa Rosa, CA 95404

RE: Request For Proposals for the Municipal Service Review and Sphere of Influence Study for Windsor Water District and Sonoma Water (Airport/Larkfield/Wikiup Sanitation Zone)

Dear Mr. Bramfitt:

Enclosed is Albert A. Webb Associates' (WEBB) response to the Sonoma Local Agency Formation Commission's (Sonoma LAFCO) Request For Proposals for the Municipal Service Review (MSR) and Sphere of Influence (SOI) Study for the Windsor Water District and Sonoma Water (Airport/Larkfield/Wikiup Sanitation Zone), all of which is collectively referred to as the "MSR Report." WEBB is teaming with Webb Municipal Finance, LLC (WMF) to prepare the Sonoma LAFCO's MSR Report.

WEBB has consistently provided civil engineering, planning, and environmental services to public sector clients throughout California since 1945. Our in-house specialists have the expertise to meet the needs of water and special districts, cities, counties, regional agencies, and our partner firms within the industry. Sonoma LAFCO's project will benefit from our water resources planning, engineering, GIS, as well as municipal finance staff under one roof specializing in water and wastewater infrastructure.

By selecting the WEBB & WMF Team, you will have a trusted local partner with the technical experience in all environmental, planning, engineering, and municipal finance consulting services.

- Stephanie Standerfer

We pride ourselves on:

- Wide breadth of technical expertise and fluid accessibility to WEBB's other departments including engineering
- Knowledge of the regulatory issues specific to imported water and groundwater projects
- Excellent communication and responsiveness with clients
- Balanced project teams with extensive experience with public agencies
- Qualified Environmental Planners, Water Resources Planners, and CEQA/NEPA practitioners

Our proposal reflects an experienced technical team strong in all planning, engineering, municipal finance, GIS, and environmental consulting services, including MSR and SOI updates, which are required for Sonoma LAFCO's projects.

WEBB is confident we can provide the impartial consulting services Sonoma LAFCO's Team can rely on.

On behalf of our entire project team, I would like to thank Sonoma LAFCO for this opportunity to submit our proposal for this very important project. We look forward to discussing our team, our scope, and ideas with you in greater detail.

As a Vice President at WEBB, I offer my personal commitment to provide Sonoma LAFCO the best resources and services available and I will serve as the individual with authority to negotiate and contract with Sonoma LAFCO. If you have the need to talk to me at any time, either before or after your selection decision, please contact me at 951.686.1070, or you can email me at stephanie.standerfer@webbassociates.com.

Sincerely,



Stephanie Standerfer - Vice President

3788 McCray Street, Riverside, CA 92506

stephanie.standerfer@webbassociates.com | 951.686.1070

**THANKS FOR
CONSIDERING
US TO
BE YOUR
PARTNER.**

Table of Contents

Section 1. Submittal Statement.....	1
Section 2. Project Team Qualifications.....	5
Section 3. Subconsultants	15
Section 4. Related Experience	16
Section 5. Approach	24
Section 6. Conflict Disclosure	25
Section 7. Assistance Identification	26
Section 8. Project Schedule	27
Section 9. Project Team Availability.....	28
Section 10. Anticipated Project Cost	29
Section 11. Example MSR/SOI Study	30

Section 1. Submittal Statement

Since 1945, WEBB, a California corporation, has consistently provided civil engineering services to public sector clients in California, showcasing exceptional financial stability over the years. With offices in Riverside and Murrieta, we strategically serve the diverse needs of our valued clients.

WEBB is a comprehensive in-house professional services firm with extensive expertise, dedicated to serving public and private sector clients throughout Inland Southern California. Our broad range of services covers project development, planning, design, entitlement, funding, permitting, construction management, and inspection. This, coupled with our enduring legacy and strategically located offices, makes WEBB the premier choice for comprehensive civil engineering services, ensuring the success of our clients' projects and fostering continued professional partnerships.

Service Departments

- Water Resources
- Construction Management and Inspection
- Land Development Planning and Entitlement
- Land Development Engineering
- Traffic and Transportation Engineering
- Environmental Services
- Land Survey and Mapping Services
- Landscape Architecture
- Geographic Information Systems

For detailed information on our services, simply click on the corresponding icons for more insights or visit webbassociates.com/services.

Owner and Principal Parties

- Matthew Webb, PE, TE, LS - President/CEO
- Scott Webb - Senior Vice President
- Steve Webb - Director of Risk Management
- Brian Knoll, PE - Chief Operations Officer
- Kevin W.M. Ferguson - Chief Development Officer
- Scott Hildebrandt, PE - Chief Strategy Officer
- Todd Smith - Chief Financial Officer
- Sam Gershon, RCE - Senior Vice President
- Bruce Davis, PE - Senior Vice President
- Dilesh Sheth, PE, TE - Senior Vice President
- Stephanie Standerfer - Vice President
- Jason Ardery, PE, TE, LLS, CPESC, QSD - Vice President
- Joseph Caldwell, PE, CPESC, CPSWQ - Practice Area Leader
- Emily Webb, J.D. - Senior Land Use and Entitlement Specialist

Firm Specifics

1945

Founding Year

180

Number of Employees

60+

Professional Licenses



Corporate Headquarters

3788 McCray Street
Riverside, CA 92506
951.686.1070



Murrieta

41870 Kalmia Street #160
Murrieta, CA 92562
951.686.1070



Clients benefit from Stephanie's interdisciplinary environmental compliance background on a variety of controversial projects. Stephanie brings a comprehensive, pragmatic and problem-solving attitude on her Projects. She manages her Team to bring clients responsive proactive solutions.

Led by **Principal-in-Charge, Stephanie Standerfer**, Sonoma LAFCO will have a singular point of contact along with **Contract Manager, Autumn DeWoody**, who will manage the four key components to making Sonoma LAFCO's Municipal Service Review and Sphere of Influence Update a success: civil engineering, GIS, planning, and municipal finance. WEBB has prepared MSRs (aka Service Area Plans) and Sphere of Influence updates for Imperial County, Inland Empire Utilities Agency, Niland Sanitation District, and Heber Public Utility District, as well as the City of Calexico General Plan and EIR. WEBB is also nearing completion of a MSR/SOI update with consolidation feasibility analysis for Orange County Water District and Municipal Water District of Orange County.

WEBB has partnered with **WMF**, to provide Municipal Finance Advisory Services. WMF is a Municipal Securities Rulemaking Board (MSRB) Registered Municipal Advisor Firm, offering valuable assessment engineering, special tax consulting, fiscal analysis, financial modeling, and comprehensive program management of special financing districts on behalf of public agencies. The WMF Team are experts in California Code and with a collaborative effort, can provide progressive solutions in concert with all laws and regulations within the industry.

WEBB stands out from our competition as a multidisciplinary firm. Our team is knowledgeable of the CKH Act, LAFCO policy and processes, municipal financing, water agency governance, and extensive experience presenting to governing bodies at public meetings.



WEBB's and WMF's management level understanding of how wastewater services are financed and delivered

WEBB has completed numerous wastewater projects at the planning, conceptual, engineering, and construction phase level. WEBB has assisted several municipalities, districts, and agencies with master planning efforts, specifically focusing on near- and long-term capital improvement project forecasting, cost estimations, and funding mechanisms including financing. Our firm is able to conceptualize, plan, and deliver capital wastewater projects including sewer conveyance, lift stations, communication and telemetry (SCADA), and wastewater treatment plants. WEBB has assisted agencies statewide to provide cost of service, existing and future staffing requirements, rate analysis, operating budgets, and funding requirements.

WEBB's and WMF's familiarity with the Cortese-Knox-Hertzberg Act, the role and functions of LAFCOs, and the MSR/SOI Study process

Whether the analysis is called an MSR, Service Area Plan, Plan of Service, Fiscal Analysis, Consolidation Review, Annexation, De-Annexation, or Service Review, WEBB has been answering our clients' questions related as to whether they can sufficiently meet the future needs of customers long before the CKH Act came about. WEBB is familiar with the CKH Act with projects involving the LAFCO's of Riverside, Orange, and Imperial Counties. WEBB stands out from our competition as a multidisciplinary firm with in-house environmental, engineering, and GIS services. Our team is knowledgeable of the CKH Act, LAFCO policy and processes, municipal financing, water agency governance, and extensive experience presenting to governing bodies at public meetings. WMF will rely on Webb's direction with regards to the CKH Act, the role and functions of LAFCOs, and the MSR/SOI Study process

WEBB's and WMF's experience in governmental organization analysis, including performance measurement and evaluation

WEBB will rely on the financial data provided for the study in order to determine opportunities for cost-savings and service efficiencies. Relying on the financial data for governmental organization analysis keeps the effort objective and less complex. WEBB prepared a Plan of Service Report that analyzed a consolidation scenario between Inland Empire Utilities Agency and the Chino Basin Water Conservation District. WEBB has nearly completed a consolidation study of Orange County Water District and Municipal Water District of Orange County that uses budgets, account balances, and employee benefits to determine cost-savings from consolidation. WMF will rely on the financial data provided for the study in order to determine opportunities for cost-savings and service efficiencies. WMF partnered with the WEBB team and is in the process of preparing a consolidation study of Orange County Water District and Municipal Water District of Orange County that uses budgets, account balances, and employee benefits to determine cost-savings from consolidation.

WEBB's and WMF's ability to facilitate and synthesize input from a variety of sources

As a multi-disciplinary consulting firm, WEBB is well versed in analyzing data from a variety of sources and formats, including public comments given in electronic and verbal formats. WEBB helps our public agency clients navigate the process of receiving input and deciding on appropriate responses. WMF is experienced in compiling, analyzing, and reconfiguring data from a variety of sources and in various formats and reporting on the resulting analysis.

WEBB's and WMF's ability to interpret varied financial and planning documents

WEBB will rely on our sister company, Webb Municipal Finance, and their deep well of knowledge in the financial sector of public agencies to interpret financial documents. Planning documents such as engineering water/sewer/drainage master plans, Urban Water Management Plans, and infrastructure capital improvement programs can be interpreted with the experience of our Water Resources Department. Environmental planning documents such as General Plans and Environmental Impact Reports can be interpreted by our capable environmental analysts in the Environmental Services Department. Lastly, GIS data can be analyzed by our GIS experts present within all three groups: environmental, engineering, and municipal finance. WMF works with public agencies and is well versed in reading and interpreting regulatory reports and financial documents.

WEBB's and WMF's experience in identifying and fostering multi-agency cooperation

WEBB is adept at fostering communication between agencies in order to address the needs of our clients. We pride ourselves on being impartial and empathetic to different viewpoints while maintaining our core values of honesty and transparency. WMF's approach fosters relationship-building and open communication which allows for ease in discussion of any potential issues that may arise, and immediately provides quick resolutions.

WEBB's and WMF's ability to conduct public input processes

WEBB has extensive experience speaking at public forums, including presentations for city councils, boards of directors, LAFCO commissioners, and mutual water company shareholders. We work closely with our clients to understand what is anticipated and expected during the public input process. WMF regularly attends council/ board and property owner meetings, often presenting agenda items and answering questions.

WEBB's and WMF's experience in presenting and disseminating information to local agencies and to the public for review and comment

WEBB's Environmental Services Department has experience in disseminating information to local agencies and to the public for review and comment since the department was formed with the passage of the California Environmental Quality Act (CEQA) in 1972. CEQA's highest aim is to disseminate facts. In addition, we navigate clients through the public noticing requirements of the California Water Code for modifications to ordinances, water conservation plans, and the Urban Water Management Plan process every five years. We will work with our clients to ensure notices and postings are timely and accurate. WMF has experience in presenting and disseminating information to local agencies and mailing required notices to property owners.

WEBB's and WMF's ability to work cooperatively with multi-agency interests

WEBB's 79 years of consulting experience in Southern California has brought together clients with many divergent and complex interests; however, we aim to facilitate a neutral, collaborative environment for the benefit of our community. WMF has the ability to work cooperatively with multi-agency interests.

Section 2. Project Team Qualifications

Knowledge, experience, and responsiveness are key elements of a strong team needed to exceed Sonoma-LAFCO's goals and expectations for future projects. WEBB has a team of professionals that will deliver these key elements to all your projects. Based upon the full breadth of the Scope of Work required, WEBB has selected Autumn DeWoody to serve as Contract Manager for the project.



Autumn DeWoody
Senior Environmental Analyst -
Water Resources Planning

951.320.6046

autumn.dewoody@webbassociates.com

Contract Manager Highlights

- Eight years of pertinent experience with WEBB
- Experience with Service Area Plans/Municipal Service Reviews
- Strong technical background on analyses of water, wastewater, and drainage projects
- CA-NV AWWA Certified Level 1 Water Loss Audit Validator
- Organized, unbiased, empathetic

Autumn will serve as Contract Manager and will be Sonoma-LAFCO's primary Point-of-Contact for the project. Autumn will act as an extension of Sonoma-LAFCO staff to ensure a successful outcome of this project from beginning to end. This will include a strict adherence to the project schedules and QA/QC standards that will be developed and maintained at the project's onset. Autumn will be supported by a highly qualified project team with experience on similar projects. The experience of this team will improve overall project management and provide very effective and efficient services.

Since 2021, Autumn has served as the project manager for the Imperial County Department of Public Work's MSR Updates for three very different communities with varying County services: Niland CSA #1, Cady Poe Colonia, and Gateway of the Americas CSA. She is also the current Program Manager for an MSR/SOI Update for Orange County Water District. As a result, she is knowledgeable of the CKH Act of 2000 and the uniqueness of each LAFCO for what is expected in their respective MSRs. The majority of her clients are public water agencies and the nature of her work often requires public presentations to staff and elected officials. Examples of presenting to governing bodies at public meetings in the past three years (2020-2023) include:

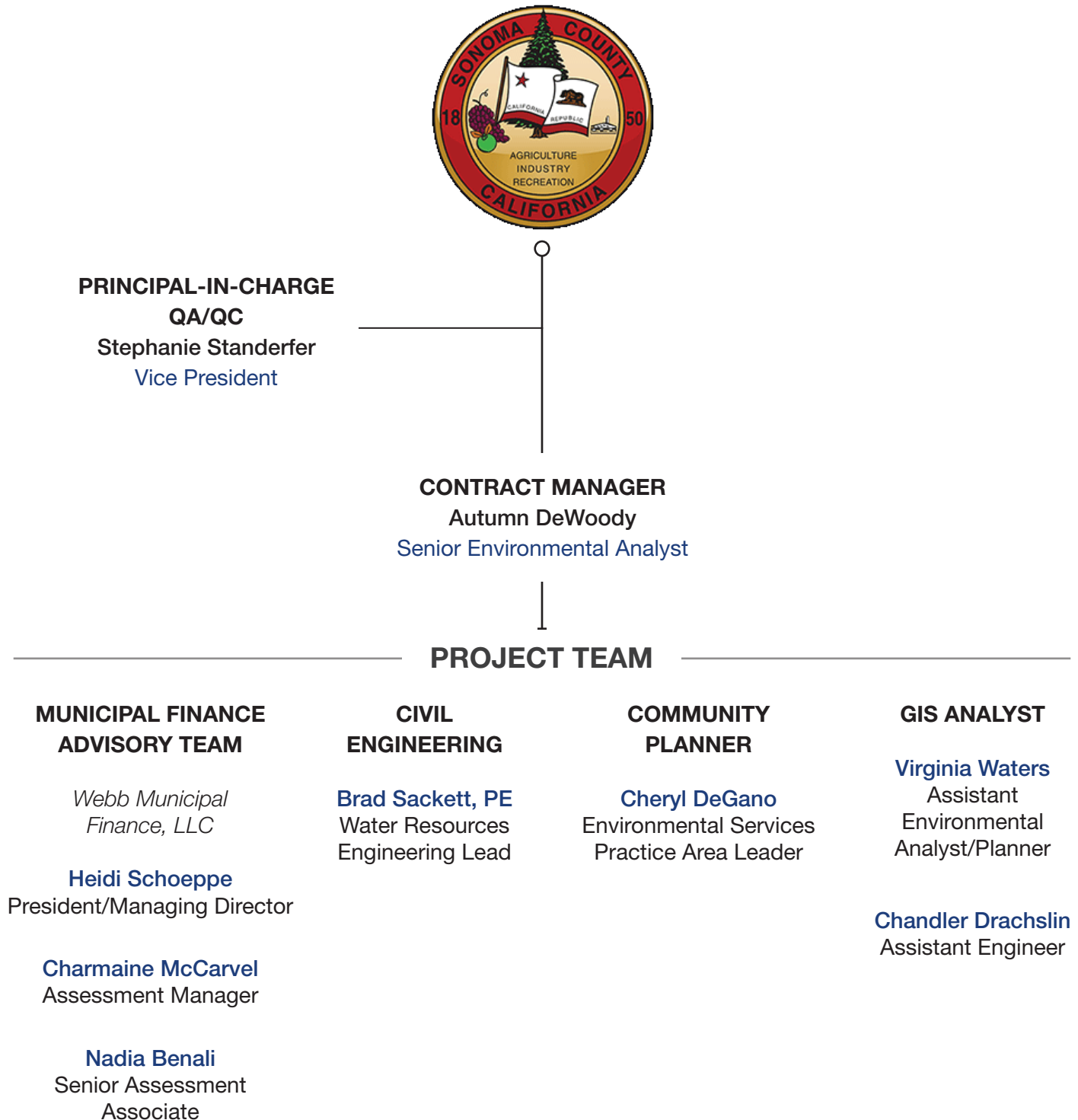
- Jurupa Community Services District Board of Directors
- Rubidoux Community Services District Board of Directors
- Beaumont-Cherry Valley Water District Board of Directors
- South Mesa Water Company Board of Directors
- Crestline Village Water District Board of Directors

Autumn's water resources planning skills include Urban Water Management Plans, Water Supply Assessments, Annual Water Supply and Demand Assessments, and land use and growth projections for wastewater and water master plans. These projects have been led by the same team to be assigned to Sonoma-LAFCO's project.

Autumn brings over a decade of water-related experience in Inland Southern California including local university research in stormwater economics and management, non-profit water quality advocacy and on-the-ground improvement projects, and commercial wet-chemistry laboratory work.

Key Personnel Organization

We have assembled a project team of highly experienced personnel with extensive experience in GIS, planning, engineering, and municipal finance. Our Principal-in-Charge, **Stephanie Standerfer**, and Contract Manager, **Autumn DeWoody**, have worked together on projects for the last 10 years and are committed to providing the hands-on leadership Sonoma LAFCO needs for this project. WEBB has partnered with Webb Municipal Finance, LLC (WMF) and President/Managing Director, **Heidi Schoeppe** will lead the Municipal Finance Advisory Team.





Autumn DeWoody

Senior Environmental Analyst

Autumn DeWoody is a Senior Environmental Analyst with WEBB's Environmental Services Department. Autumn specializes in planning documents prepared on behalf of our water, wastewater, and drainage clients. In addition, Autumn offers private and public clients jurisdictional delineations and regulatory permitting services. Autumn also provides grant research and application services and supports WEBB's CEQA practitioners on topics of biology, hydrology, and water quality.

Autumn is certified with the California-Nevada Section of the American Water Works Association as a Level 1 Water Audit Validator for the validation of potable water loss audits, and a former Certified Professional in Storm Water Quality (CPSWQ). Since 2015, under the tutelage of Mr. Sam I. Gershon, RCE, she has become WEBB's primary expert on Water Supply Assessments, Written Verifications of Sufficient Water Supply, and Urban Water Management Plans. Autumn has also spearheaded WEBB's Municipal Service Review and Sphere of Influence updates services for LAFCOs taking advantage of WEBB's unique relationship with WMF. Using her strong analytical skills, she is familiar with the intricacies of complex water supply portfolios and the technical components of planning for future water services and appreciates the importance of timely client communication in order to collect pertinent data that is sufficiently detailed and accurate to provide a thorough reflection of the project. This data collection, communication, and collaboration early in the project has proven to keep projects on schedule and budget.

Autumn brings over a decade of water-related experiences in the Inland Empire including local university research in stormwater management, local non-profit water quality advocacy and on the-ground improvement projects, to commercial wet-chemistry laboratory work. She has completed several courses with Wetland Training Institute, Inc. and university extension courses.

EDUCATION

MS, Environmental Sciences
University of California, Riverside

BS, Environmental Sciences
University of California, Riverside

CERTIFICATIONS

Certified Level 1 Water Audit Validator

AFFILIATIONS

Association of Environmental Professionals
(AEP)

National Groundwater Association (NGWA)

- MSR/SOI and Consolidation Feasibility Study for Orange County Water District, In progress
- MSR Updates for Niland CSA #1, Cady Poe Colonia, and Gateway of the America's CSA, Imperial County Department of Public Works, In Progress
- Prepared land use and growth projections for the 2020 Wastewater and Water Master Plans for Jurupa Community Services District and Rubidoux Community Services District, respectively
- Land Use and Growth Projections for City of Fontana Sewer Master Plan, In Progress
- Project Manager for Engineer's Report for Cedarpines Park Mutual Water Company
- Project Manager for 2015 & 2020 Urban Water Management Plans, Jurupa Community Services District
- Project Manager for 2015 & 2020 Urban Water Management Plans, Crestline Village Water District
- Project Manager for 2020 Urban Water Management Plan, Rubidoux Community Services District
- Water Supply Assessment for City of Rancho Santa Margarita General Plan Update, Santa Margarita Water District
- Water Supply Assessments & Written Verifications for Rich Haven Specific Plan, West Ontario Commerce Center, Colony Commerce Center East, Subarea 29 Specific Plan, West Haven Specific Plan, and Parkside Specific Plan, City of Ontario Municipal Utilities Company
- Water Supply Assessment for Banning Distribution Center, City of Banning
- Water Supply Assessment for Cherry Valley Industrial Park, Beaumont-Cherry Valley Water District
- Water Supply Assessment for Calimesa Residential Infill Project, South Mesa Water Company
- Water Supply Assessments & Written Verifications for Vernola Ranch Specific Plan and Leal Master Plan, Jurupa Community Services District



Stephanie Standerfer

Vice President

Stephanie Standerfer is a Vice President and Director of WEBB's Environmental Services Department. Stephanie has worked as an environmental planning project manager, focusing on CEQA matters for small, medium, and large public and private projects. Stephanie has managed all levels of CEQA documents for healthcare clients, community college districts, water districts, cities, counties, and private developers. Her varied project experience allows her to foresee and navigate challenges that arise during CEQA compliance. As an expert in CEQA implementation throughout Inland Southern California, she also provides local agencies training in CEQA processing. She regularly oversees and coordinates with large teams of environmental planners, engineers and architects, and actively assists her clients through the environmental compliance gauntlet.

EDUCATION

MS, Environmental Sciences,
Washington State University, Pullman, WA
BS, Environmental Sciences,
University of California, Riverside

AFFILIATIONS

American Planning Association
Association of Environmental Professionals,
President, Inland Empire Chapter
Chair, Economic Development Council,
Greater Riverside Chamber of Commerce
Chair, City of Riverside Cultural Heritage
Board, (2003–2011)

Stephanie served as contract staff to the Western Riverside County Regional Conservation Authority (RCA), the agency responsible for implementing the Western Riverside County Multiple Species Habitat Conservation Plan (MSHCP). In this role, she provided processing, review, and consultation on MSHCP implementation procedures and policies. She provided training and policy guidance documents to not only the RCA but all permittees which included all 17 cities in western Riverside County. In this capacity she regularly interfaced with regulatory agencies working toward solutions to MSHCP compliance issues. Stephanie's experience with the RCA has resulted in a solid amicable working relationship with the regulatory agencies which allows her to anticipate issues on projects before they arise and advise clients accordingly.

Clients benefit from Stephanie's interdisciplinary environmental planning background which includes experience on general plan updates, specific plans, planning studies, environmental constraints analyses, air quality impact studies, health risk assessments, noise studies, biological resource surveys, and cultural resource studies. She has managed small and large teams of subconsultants, engineers, and architects on a variety of controversial public works and private development projects over the years and often spearheads making public presentations on her projects.

Because of her reputation as a CEQA authority, clients seek out Stephanie's assistance in peer reviewing CEQA documents and guidance on CEQA and MSHCP processing strategies. She enjoys working closely with her clients and establishing long-standing professional relationships with her clients.

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- IEUA Consolidation LAFCO Review, Inland Empire Utility Agency
 - San Jacinto River Master Drainage Plan Phase 3, Environmental Impact Report, Riverside County Flood Control and Water Conservation District
 - Wastewater Treatment Plan Upgrade and Brineline, IS/MND, CEQA-Plus & CEQA, City of Beaumont
 - Master Sewer and Water Plans, Jurupa Community Services District
 - Residential Infill Priority Area Overlay Zone, EIR, City of Calimesa



Cheryl DeGano

Practice Area Leader

Cheryl DeGano serves as a Practice Area Leader with WEBB's Environmental Services Department. Cheryl manages the preparation and approval of environmental and planning documents for public and private sector clients. During her consulting career, Cheryl has been responsible for the preparation and processing of environmental and planning documents including environmental impact reports, environmental assessments, initial studies and mitigated negative declarations, Mitigation Monitoring and Reporting Programs (MMRPs), specific plans, development impact fee ("Nexus") studies per California Government Code 66000 et seq., and development and entitlement applications. Cheryl has been responsible for all aspects of these projects including research, data collection and analysis, report writing, quality assurance/quality control review, preparation of distribution lists, direction of public noticing, project management, representation at public meetings and hearings, and agency and client coordination. Cheryl is also experienced in the analysis of construction noise using the Federal Highway Administration's Roadway Construction Noise Model (RCNM). In addition to her environmental and planning background, Cheryl has assisted public agencies and private sector clients finance public facilities/services through the formation and administration of special finance districts and is well versed in socio-economic issues.

EDUCATION

BA, Biology
University of California, Riverside

AFFILIATIONS

American Planning Association (APA)
Association of Environmental Professionals
(AEP)
AEP Co-Vice President of Programs 2019
AEP Inland Empire Chapter President 2013

Cheryl possesses strong communication and analytical skills and establishes and maintains excellent client relationships. Cheryl has a proven ability to take over large projects with minimal disruption to the client, experience with high profile and controversial studies, and the ability to work effectively and collaboratively within the increasingly complex regulatory and environmental context of development in Southern California to develop solutions, strategies, and feasible alternatives for complex projects.

Cheryl is experienced in the preparation of environmental and planning documents and assisting public agencies and private sector clients finance public facilities/services through the formation and administration of special finance districts and the preparation of development impact fee studies. Strengths include communication and analytical skills, establishment and maintenance of excellent client relationships, proven ability to take over large projects with minimal disruption to the client, experience with high profile and controversial studies, and a desire to work collaboratively toward a common goal.

-
- Irwin and Linda Vista Reservoirs and Transmission Mains, Golden State Water Company
 - Master Sewer and Water Plan, Jurupa Community Services District
 - Sky 2 Sewer Lift Station Conversion, Jurupa Community Services District
 - Northern Feeder Pipeline, Jurupa Community Services District
 - Recycled Water Expansion, Jurupa Community Services District
 - JCSD and RPU Intertie Pipeline - IS/MND, Jurupa Community Services District
 - Mission Inn Booster Pumping Station - CEQA Services, City of Riverside
 - Riverside Corona Feeder, EIR/EIS, Western Municipal Water District
 - Benedict Reservoir - IS/MND, Jurupa Community Services District
 - Wastewater Treatment Plant and Brine Line - MND, City of Beaumont



Bradley A. Sackett, PE

Water Resources Engineering Lead

Brad Sackett, PE, is a Senior Engineer and Project Manager with WEBB's Water Resources Department. Brad specializes in assisting major public agencies with a wide variety of water resource projects. Clients seek his expertise with pumping facilities, water pipeline design, gravity sewer main design, water and sewer system master plans, hydraulic modeling analysis, and sewer resource plans for Specific Plan Environmental Impact Reports (EIRs), among other projects.

Brad has been instrumental in assisting clients with in-house projects, while representing these agencies with their constituents as an on-site consultant. Throughout Brad's career he has been intricately involved in the design, management, and construction support of projects for such clients as Eastern Municipal Water District (EMWD), Western Municipal Water District (WMWD), and the cities of Riverside and St. Helena, to name a few.

His detailed approach ensures each project integrates flawlessly into master plan requirements from concept through construction. He specializes in operations take-over and integration of systems with a focus on cost effective and efficient transitions.

REGISTRATIONS

Registered Civil Engineer C 65862 (CA)

EDUCATION

BS, Chemical Engineering
Massachusetts Institute of Technology

AFFILIATIONS

American Water Works Association (AWWA)

Recycled Water System Preliminary Design Report, Jurupa Community Services District (JCSD) (District) - Brad served as Assistant Project Manager for the WEBB Team that completed the Preliminary Design Report for the District's proposed recycled water system to convey recycled water from the WRCRWA's treatment plant to existing parks, schools, and street landscaping throughout the City of Eastvale for connecting to an existing system that serves some existing irrigation customers within Area B located in the City of Jurupa Valley.

The proposed system will serve recycled water for irrigation to various parks, schools, and landscaped medians within the City of Eastvale. The pipelines will vary in size from 24-inch diameter for the largest transmission pipeline down to 8-inch diameter pipelines for the distribution pipelines, totaling approximately 54,900-LF. This system will have the potential to serve nine parks, seven schools, and approximately 19 median landscape meters. The proposed pump station will be located at the WRCRWA's wastewater treatment plant in Eastvale. As part of the recent upgrade at the plant, initial planning and preliminary design were completed for the future recycled water pump station for the District.

Redlands and Hemlock Booster Station, EMWD (District) - WEBB provided preliminary and final design engineering services for the replacement of the District's 1,827-GPM Redlands and Hemlock (previously Ironwood) Booster Pumping Stations (BPS) with a new 3,000-GPM Redlands and Hemlock BPS located in the City of Moreno Valley. The existing, partially below-grade facility reached its useful life and was creating a variety of operational and maintenance challenges. The project consisted of preliminary design, facilities site analysis, property acquisition support, project management, survey, geotechnical study, electrical study and coordination, Southern California Edison (SCE) plan

Bradley A. Sackett, PE

Senior Engineer

of service, system hydraulic evaluation, CEQA support, operational control strategy, preparation of design contract documents (plans and specifications), cost estimates, and bidding assistance. The project also included the preparation of bid documents for the abandonment and demolition of the existing facility.

O'Ferrell Street Booster Station, EMWD - Brad served as the Project Manager for the planning and design of this 1,000-GPM potable water pump station which ultimately included two 500-GPM vertical turbine pumps with a 500-GPM standby pump. WEBB's services included site acquisition, metering, and design of reverse flow control valves, a masonry block building, and an emergency generator. Brad and the WEBB Team also assisted with site improvements including paving, a block wall and gates suction and discharge pipelines, an access road, and demolition of the existing booster station. WEBB also provided all environmental services for a complete Initial Study/Mitigated Negative Declaration.

Vista Ellis Improvement Project – EMWD (District) - Brad served as Project Manager for the Vista Ellis Improvement Project which includes a 5,600-GPM booster pump station, a 5.63-MG steel tank, and over 23,000-LF of 18-inch and 24-inch diameter transmission pipeline connecting the facilities. WEBB was responsible for hydraulic modeling, site selection of the booster station and storage tank, preliminary design, CEQA analysis, and the final design of all phases. The proposed pipeline is located within the City of Menifee and the County of Riverside public right-of-way and an easement at the RCFC and WCD Channel. The project allows the District to add storage to the 1,698-FT Pressure Zone and convey adequate water supplies to the 1,815-FT Pressure Zone to balance filling the Craig and Vista tanks to address water quality and hydraulic issues within the current system.

Hamner Trunk Sewer Project, JCSD - Brad served as the Project Manager for the Hamner Avenue Trunk Sewer Project. WEBB worked on the final design for a deep (24+ FT) 12-inch diameter gravity sewer main within the Hamner Avenue right-of-way from Celebration Drive to 1,400-FT south of 58th Street. The alignment of the proposed sewer main will parallel the proposed CDA product water pipeline in Hamner Avenue. The proposed sewer main is located within the City of Eastvale public right-of-way and a private easement. The project allows JCSD to convey existing domestic sewage to their regional trunk sewer facilities for treatment at the WRCRWA wastewater treatment facility, eliminating a connection to the SARI pipeline. The existing right-of-way is crowded with numerous existing utilities including the 42-inch diameter SARI pipeline, 60-inch storm drain, 30-inch JCSD potable water pipeline, 24-inch diameter Norco water pipeline, 16-inch diameter gas line, an abandoned sewer force main, two fiber optic cables, a Southern California Edison (SCE) electric line, several other smaller dry utilities, and two traffic signals.

Hamner/Detroit Product Water Pipeline, Chino Basin Desalter Authority - Brad served as the Project Manager for the Hamner Avenue Trunk Sewer Project. WEBB worked on the final design for a deep (24+ FT) 12-inch diameter gravity sewer main within the Hamner Avenue right-of-way from Celebration Drive to 1,400-FT south of 58th Street. The alignment of the proposed sewer main will parallel the proposed CDA product water pipeline in Hamner Avenue. The proposed sewer main is located within the City of Eastvale public right-of-way and a private easement. The project allows Jurupa Community Sewer District to convey existing domestic sewage to their regional trunk sewer facilities for treatment at the WRCRWA Wastewater Treatment Facility, eliminating a connection to the SARI pipeline. The existing right-of-way is crowded with numerous existing utilities including the 42-inch diameter SARI pipeline, 60-inch storm drain, 30-inch JCSD potable water pipeline, 24-inch diameter Norco water pipeline, 16-inch diameter gas line, an abandoned sewer force main, two fiber optic cables, an Southern California Edison (SCE) electric line, several other smaller dry utilities, and two traffic signals.



Virginia Waters

Assistant Environmental Analyst/Planner

Virginia Waters is an Assistant Environmental Analyst/Planner with WEBB's Environmental Services Department. Virginia assists with preparing CEQA documents including initial studies and EIR. Virginia has also contributed to a wide variety of projects including preparing and processing of entitlement projects ranging from lot line adjustments to development plans, due diligence, and various environmental documents. In addition, Virginia serves as the GIS analyst for the Environmental Services Department.

EDUCATION

BS, Earth and Environmental Sciences
Furman University



Chandler Drachslin

Assistant Engineer

As an Assistant Engineer in the Water Resources Department at WEBB, Chandler works on public works projects consisting of major pumping plants, groundwater pumping wells, sewer collection system design, wet well rehabilitation, water distribution system design, wastewater treatment plant design, and hydraulic system modeling using various computer models. Chandler provides support for several projects for public works agency clients including the Eastern Municipal Water District, City of Ontario, City of Riverside, Jurupa Community Services District, and Crestline-Lake Arrowhead Water Agency. In addition, Chandler is WEBB's GIS expert providing support to all in-house services.

EDUCATION

BS, Civil Engineering
Colorado State University



HEIDI SCHOEPPE

PRESIDENT AND MANAGING DIRECTOR

Heidi Schoeppe is a leader in the development of innovative solutions for the formation and administration of special financing districts for municipalities throughout California. Due to her technical skills and sound approach, Heidi serves as a professional resource to her clients, associates, and finance teams.

Speaking at conferences throughout California, informing clients on proposed and enacted legislation, and being called upon as an expert consultant to financing teams allows her the opportunity to provide her clients and team with the most up-to-date information in the field of special financing districts with a focus on the needs of her clients and their constituents.

With over 19 years in the field, Heidi has managed infrastructure and services special financing district formations and has participated in numerous bond financing and refinancing projects totaling more than \$1 billion in debt issuance, providing significant savings to her clients and their constituents. Heidi has authored disclosure, debt, and land secured special financing district policies, staying in front of legislative updates to ensure her clients are receiving sound advice. Heidi specializes in providing full program management, administration, annexation, district auditing, constituent relations, and consulting services including for Proposition 218, Landscaping and Lighting Act of 1972, Municipal Improvement Act of 1913, Improvement Bond Act of 1915, Mello Roos Act of 1982, and Benefit Assessment Act of 1982.

Project Role:

Municipal Finance Advisory
Team

Title:

President/Managing Director
Chief Compliance Officer

Years of Experience:

19 Years

Education:

MS, Finance
San Diego State University

BS, Business Administration
California State University,
San Marcos

Affiliations:

California Society of Municipal
Finance Officers (CSMFO)

*(Vice Chair for Communications
Committee)*

*(Advisor for Professional Standards &
Recognition Committee)*

*Leadership Team for Inland
Empire Local Chapter*

Government Finance Officers
Association (GFOA)

California Municipal Treasurers
Association (CMTA)

Member

Women in Public Finance

Committee on Assessments,
Special Taxes & Other
Financing Facilities California
Special District Association

WMF, is registered with the MSRB as a Municipal Advisor Firm, allowing us to offer valuable financial analysis, assessment engineering, special tax consulting, and comprehensive program management of special financing districts on behalf of public agencies.

Our team of 11 associates is comprised of senior level staff, multiple Registered Municipal Advisor Representatives, and experts who have dedicated their careers to assisting communities.

Our robust list of services, proven experience in all areas of municipal finance, and excellent project management approach, coupled with our mission of “integrity in our dealings with clients, staff, public officials, and the public” is what makes WMF the absolute right choice to provide efficient and fluid management for all projects.



CHARMAINE McCARVEL

ASSESSMENT MANAGER

Charmaine McCarvel, Assessment Manager, assists municipalities with formation, annexation, financing, and annual administration services which includes apportionments and bond payoff calculations for special financing districts. Her efforts help ensure districts continue to receive appropriate tax funding to provide much-needed community services and infrastructure.

Charmaine offers over 19 years of expertise in the Landscaping and Lighting Act of 1972, the Municipal Improvement Act of 1913, the Improvement Bond Act of 1915, the Mello-Roos Community Facilities Districts Act of 1982, and the Benefit Assessment Act of 1982. She has provided a full range of services including Proposition 218 compliance, dynamic client support with the preparation of annual budgets, staff reports, annual Engineer's Reports, annual disclosure reports, and legal documents required for special district formation, annexation, and administration. Charmaine currently serves as Project Manager for the Cities of Riverside, Rialto, Desert Hot Springs, Chino, Lindsay, Temecula, Tustin, Redlands, Town of Yucca Valley, the Hi-Desert Water District, Jurupa Community Services District, and the Mission Springs Water District providing service for over 300 special districts.

Project Role:

Municipal Finance Advisory
Team

Title:

Assessment Manager

Years of Experience:

19 Years

Affiliations:

California Society of Municipal
Finance Officers



NADIA BENALI

SENIOR ASSESSMENT MANAGER

Nadia Benali, an Senior Assessment Associate at WMF, provides administration and consulting services to municipalities throughout Southern California to ensure their special financing districts function smoothly. Nadia, who earned a Master of Business Administration (MBA) with an emphasis in Accounting in 2005, joined WMF with seven years of experience in district administration in the California municipal market. In fact, she has worked as a financial analyst in district administration for cities and municipalities in five different counties in the state. Nadia, who prides herself on providing excellent customer service, has served as lead contact for all of her clients.

She has administered and consulted on the Landscaping and Lighting Act of 1972, Municipal Improvement Act of 1913, Improvement Bond Act of 1915, and Mello-Roos Community Facilities Act of 1982, in addition to special "park tax" districts and those relating to fire services.

Project Role:

Municipal Finance Advisory
Team

Title:

Senior Assessment Associate

Years of Experience:

16 Years

Education:

MBA, Business Administration -
Accounting
University of Phoenix

BS, Hotel & Restaurant
Management

University of Nevada, Las Vegas

Affiliations:

California Society of Municipal
Finance Officers

Section 3. Subconsultants

WEBB has partnered with **WMF**, to provide Municipal Finance Advisory Services. WMF is a MSRB Registered Municipal Advisor Firm, offering valuable assessment engineering, special tax consulting, and comprehensive program management of special financing districts on behalf of public agencies. The WMF Team are experts in the California Code and with a collaborative effort, can provide progressive solutions in concert with all laws and regulations within the industry.

Section 4. Related Experience

Service Area Plan Updates: Gateway of the Americas (County Project No. 6262GTW); Niland County Service Area (County Project No. 6263NSA); Cady Poe Colonia (County Project No. 6261POE)

Agency MSR was prepared for:

Imperial County Department of Public Works (County)

Date: Started 2021 to Present

Client Contact: Francisco Olmedo, PE

Principal Engineer

442.265.1818

franciscoolmedo@co.imperial.ca.us



Affected Agencies and services reviewed:

WEBB is currently preparing three Service Area Plan Updates (aka, Municipal Service Reviews) in partnership with Webb Municipal Finance, LLC for Imperial County Department of Public Works: Niland County Service Area No. 1, Cady Poe Colonia, and Gateway to the America's County Service Area. The SAP follows the Imperial County LAFCO SAP Guidelines (updated 06/30/2014). Pursuant to the Cortese-Knox-Hertsberg Local Government Reorganization Act of 2000, the purpose of the SAP is to estimate the current and future demands for various public services and describes how facilities will be developed, extended, and financed to meet the projected demand.

The SAP will demonstrate the County's ability to provide adequate services within the CSA boundaries. The growth projections in the SAP are expected to come from U.S. Census data (for census-designated places), Imperial County General Plan Land Use Plan, and the Southern California Association of Governments (SCAG). WEBB will confirm with the County which facilities and services shall be included in the SAP at project start.

Outcome of MSR:

Imperial County Department of Public Works is currently reviewing the Niland CSA and Cady Poe Colonia SAP reports prepared by WEBB in anticipation of the five-year review timeline. The Niland CSA provides streetlight services, and the Cady Poe Colonia provides wastewater collection, treatment, and disposal services. We include analysis of existing conditions including site visits and recommendations to improve maintenance and financial viability in each SAP report over 10-year planning horizons.

The Gateway of the America's CSA is located along the US-Mexico International Border and provides streetlight, drainage, potable water, wastewater, and landscaping services to an area of 1,775 acres. Our report is underway and we are working collaboratively with County Staff and their other consultants to account for recent and future infrastructure improvements, federal grant funding awards, and impacts from recent storm events. The reports are still in draft form and under review by ICDPW. Below is the link to WEBB's proposal to the County.

Link and QR Code: [ICDPW WEBB Proposal](#)



Plan of Services Consolidation

Agency MSR was prepared for:
Inland Empire Utilities Agency (IEUA)



Date: August 2016

Client Contact: Kathryn Besser
Manager of External Affairs
909.993.1638
kbesser@ieua.org

Affected Agencies and services reviewed:

WEBB prepared a Plan of Service Report on behalf of IEUA for the Proposed Consolidation of IEUA and the Chino Basin Water Conservation District. This was a result of the 2015 Service Review for Water Conservation in the Valley Region conducted by San Bernardino County LAFCO that recommended consolidation of IEUA and the Chino Basin Water Conservation District (CBWCD).

Additionally, LAFCO prepared the CEQA documentation necessary to process the Consolidation/Plan for Service. WEBB prepared mapping services limited to boundaries of service areas only; the County Surveyor provided all necessary mapping needed for the Consolidation and legal description. WEBB coordinated with the IEUA finance and accounting department to provide pertinent information related to the operational budgets, account balances, and employee benefits.

Outcome of MSR:

IEUA and the Chino Basin Water Conservation District have not consolidated. The findings of the report state the following:

The majority of the services currently provided by CBWCD to its 113-sq. mi. service area duplicate the programs delivered by IEUA to the entirety of the 242-sq. mi. west valley – a service area that fully encompasses CBWCD's boundaries. The financial analysis, based on information provided by CBWCD, shows that the proposed consolidation of CBWCD into IEUA will save taxpayer money and improve management of these financial resources. The proposed consolidation of CBWCD into IEUA will result in better integration of regional programs and transparency in government decision-making.



Rancho Los Lagos Cost Analysis of Water and Sewer Options

Agency MSR was prepared for:
Vandeweghe Ventures, LLC

Date: 2015

Client Contact: Laura Vandeweghe
213.675.5271
laura@calevoo.com

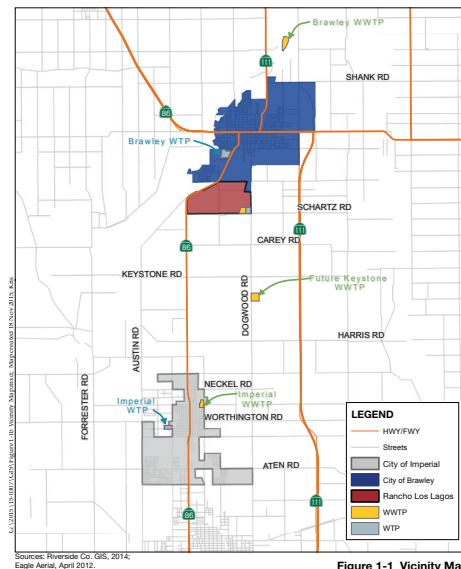


Figure 1-1 Vicinity Map

Affected Agencies and services reviewed:

WEBB developed a cost analysis of the water and wastewater options for the Rancho Los Lagos Specific Plan located just outside the City limits of Brawley. This Specific Plan is 1,076 acres of a variety of land use types including single, multi-family, and active adult residential, schools, parks, golf course, commercial, and business park areas. Five phases of development were planned. The affected agencies include the City of Brawley and Imperial County LAFCO, and the services reviewed include potable water distribution and wastewater conveyance and treatment.

WEBB analyzed two options for water supply; the City of Brawley and an onsite surface water treatment plant to be operated by a local Community Services District (CSD). Future water demands were based on a recent Water Supply Assessment to calculate water storage requirements. Existing and future known water demands were accounted for and hypothetical scenarios of infrastructure were compared. Three options were analyzed for the provision of wastewater treatment; City of Brawley, an onsite wastewater treatment plant operated by a local CSD, and a connection to the Keystone Water Reclamation Facility. Engineers cost estimates for water and wastewater infrastructure were calculated.

Outcome of MSR:

The report concluded the option of tying into the City of Brawley's water system would be the most cost effective way to provide water to the Specific Plan area. However, there are potentially more infrastructure costs depending on the City's requirements for treatment plant upgrades as the City has made a commitment to serve future developments which will deplete the City's treatment capacity surplus.

Building a local CSD wastewater treatment plant is the most cost effective way to manage the wastewater generated from the Specific Plan area, from an infrastructure cost standpoint. A Membrane Bioreactor (MBR) plant uses a membrane filter to effectively treat wastewater, requires a small footprint, and is generally a good neighbor. Another reason for this recommended process is for the added benefit of tertiary effluent which could be used for the golf course and reverse frontage landscaping planned for the RLLSP area. This option also presents the opportunity to partner with the City of Brawley to remove sewer flow from the City's existing collection and treatment facilities.



Service Area Plan for Water and Sewer

Agency MSR was prepared for:

City of Calexico (City)

Date: November 2005

Client Contact: Clint Hale, Hale Engineering, Inc.

858.715.1420 ext. 103

ceh@haleengineering.com



Affected Agencies and services reviewed:

WEBB developed the Service Area Plan for Water and Sewer for the City and CM Ranches. For this project, WEBB prepared base maps using mapping data provided by the City to determine the five-year planning boundaries. Based on information provided by the City, existing and planned facilities were incorporated into the base maps.

WEBB met with City Staff to determine the applicability and viability of existing planning documents for sewer and water facilities. Based on input from City Staff, WEBB summarized all sewer and water facilities already planned, their location and size, and the extent of the area to be served by these facilities. WEBB determined the population and number of EDU's to be served within the five-year boundary based on current development plans, proposed land uses and estimated percentage of developable land. Results were tabulated and presented to all stakeholders for review and comment. Based on comments, population and EDU's were finalized and used as the basis for subsequent calculations.

WEBB also prepared a backbone hydraulic model. Only pipelines with diameters 12-inch and larger were included. Maximum Day with Fireflow, Peak Hour and Tank Refill conditions were analyzed to determine the sizes and location of major water facilities required to meet ultimate demand. A proposed facilities plan tied to the five-year boundary was developed and submitted to City Staff for review. WEBB also prepared a map of the proposed backbone sewer system facilities using facilities planned by the City. WEBB modeled the backbone sewer facilities and confirmed sizing based on peak flow and the City's Engineering Design Standards. Lastly, WEBB summarized our findings from the above investigations and studies into Sewer and Water Service Area Plans in a format suitable for submittal to LAFCO.

Outcome of MSR:

To date, only the school component of the Specific Plan has been constructed.

Link and QR Code: [City of Calexico Service Area Plan](#)



Additional Relevant Project Experience

Sewer System Service Area Plan (SAP) Update

Niland Sanitation District

Client Contact: John Kemp (City of Riverside Public Works)

951.351.6267

jkemp@riversideca.gov

WEBB developed the Sewer System Service Area Plan Update for the Niland Sanitation District (NSD). This project consisted of reviewing NSD's expanded service area sphere of influence boundary and performing research and data collection of all boundary lines and land use records, interviews with NSD personnel for operational concerns, and obtained record information for the wastewater treatment plant and sewer collection system. Based upon the boundary lines and land use provided, WEBB prepared population and growth projections for the expanded sphere of influence. WEBB then determined current and future sewer demands based upon the growth projections in five-year intervals.

Webb Municipal Finance - Relevant Project Experience



FORMATION, DEBT ISSUANCE, ADMINISTRATION, AND PROGRAM MANAGEMENT SERVICES FOR COMMUNITY FACILITIES DISTRICTS

Client:

Eastern Municipal Water District
2270 Trumble Road
Perris, CA 92572

Contact:

Thomas Hays
Assistant Chief Financial Officer
951.928.3777 ext. 4952
hayst@emwd.org

Fiscal Years (FY) of Service:

FY 2000-2001 to Present

Project Team:

Heidi Schoeppe - PM
Matt Chesney - APM
Brent Howard - Analyst
Josh Norris - GIS

WMF assumed and seamlessly transitioned the annual administration for all of EMWD AD and CFD. WMF performed parcel auditing services for all assumed districts and currently provides formation and comprehensive administration services for six active ADs and 88 active CFDs. WMF has assumed the role of Program Manager for the entire book of EMWD's special financing district work.

Program Management Services

- Manage all CFD related requests including formation of new CFDs, amending the structure of an existing CFD, Joint Community Facilities Agreement requests, and requests to issue CFD bonds from developers or consultants

Formation Services

- Prepare CFD Report, the Rate and Method of Apportionment and provide projections of special tax revenues

Bond Issuance and Refinancing

- Research, compile, and analyze appropriate data to generate tables for inclusion in preliminary and final bond offerings
- Review and provide comments to all bond issuance documents and assists in any analysis and presentations for credit ratings

Administration Services

- Prepare annual budgets, levy enrollments, CDIAC, SB165, and AB2109 report preparation, special tax prepayment calculations and release of lien(s), public information services, parcel and development status research, and delinquency management



FORMATION AND ADMINISTRATION SERVICES

Client:
City of Temecula
41000 Main Street
Temecula, CA 92590

Client Contact:
Jennifer Hennessy
Director of Finance
951.694.6430
jennifer.hennessy@temeculaca.gov

WMF currently performs administrative services for the City of Temecula's Assessment District (AD), Community Facilities Districts (CFD), and the Temecula Community Service District's Service Levels. WMF recently provided services for the formation of a Municipal Services CFD within the City. Administration services provided for the City include researching parcel changes, land use changes, and building permit activity to establish the current assessment rates and levies, annual budget preparation, fund balance analysis, Engineer's Reports, City Council resolutions, annual calculation and submission of special taxes to the Riverside County Auditor-Controller, exhibits including levy audit map, CDIAC, AB2109, and annual disclosure reporting, property owner inquiries, and other special projects.

Fiscal Years (FY) of Service:
FY 2014-2015 to Present

Project Team:
Heidi Schoeppe - PIC
Charmaine McCarvel - LLM PM
Nadia Benali - LLMD APM
Matt Chesney - CFD PM
Brent Howard - CFD APM
Matthew Webb, PE, TE, LLS -
EOR
Josh Norris - GIS

Administration Services

- Seven Community Facilities Districts
- One Assessment District
- One Parks and Lighting Citywide Tax
- Four Community Service Districts

Proposition 218 Balloting Proceedings

- Provide assessment balloting proceedings for the City's 29 Zones within Community Services Districts

Formation Services

- Determined the tax rate structure and the preparation of the Rates and Method of Apportionment of Special Tax

Bond Issuance and Refinancing

- Analyze appropriate data for inclusion in bond offering statements
- Review comments to bond issuance documents and assists in any analysis and presentations for credit ratings



ADMINISTRATION AND FORMATION SERVICES FOR SPECIAL DISTRICTS

Client:

City of Riverside
3900 Main Street, 6th Floor
Riverside, CA 92522

Client Contact:

Meline Carranza
Debt & Treasury Manager
951.826.3904
mecarranza@riversideca.gov

Fiscal Years (FY) of

Service:

FY 2000-2001 to Present

Project Team:

Heidi Schoeppe - PIC
Charmaine McCarvel - PM
Victoria Banks-Lai - APM
Matthew Webb, PE, TE,
LLS - EOR
Josh Norris - GIS

WMF has been providing formation, bond issuance, and administration services to the City of Riverside since Fiscal Year 2000-2001. We have formed CFD, Assessment Districts (AD), and Landscape Maintenance Districts (LMD). The City's CFDs and ADs provide funding for the construction and acquisition of improvement facilities, as well as maintenance services throughout the City. The types of facilities financed through the use of special districts include roadway improvements, storm drain, water, landscape and irrigation improvements, wall rehabilitation, and street and display lighting. The City's Street Light Assessment District (SLAD) and LMDs provide for the operation and maintenance costs of the City's street lighting and landscaping throughout the entire City.

Administration Services

- Four Assessment Districts
- Nine Community Facilities Districts
- Two Landscape Maintenance Districts
- One Street Light Assessment District
- Community Service Area 152

Formation Services

- Prepared CFD/Engineer's Reports including the outline of the plans and specifications, collection and review of data related to the formation and Rates and Method of Apportionment
- Prepare boundary maps, assessment diagrams, and tax roll preparation
- Currently assisting in the formation of a Public Services Community Facilities District

Bond Issuance and Refinancing

- Research, compile, and analyze appropriate data to generate tables for inclusion in preliminary and final bond offerings
- Review and provide comments to all bond issuance documents and assists in any analysis and presentations for credit ratings

Section 5. Approach

WEBB will prepare the Municipal Service Review and Sphere of Influence Amendment Study (MSR/SOI Study) for the Windsor Water District and the Airport/Larkfield/Wikiup Sanitation Zone (ALWSZ) pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000. We understand the ALWSZ is located outside of Windsor Water District's sewer service area and currently within the wastewater collection and treatment service area of Sonoma Water.

According to the RFP, Windsor Water District and Sonoma Water have identified a reorganization opportunity that would result in "significant capital and operational cost savings" if the Airport component of ALWSZ were annexed into the Sphere of Influence of Windsor Water District for sewage collection and treatment services. The Larkfield and Wikiup components of ALWSZ would remain with Sonoma Water for sewage collection services, but Sonoma Water would contract with Windsor Water District for sewage treatment services for Larkfield and Wikiup.

The MSR/SOI Study would evaluate the following options:

- No sphere amendment
- A services contract between the two agencies
- A sphere amendment as envisioned by the two agencies
- A sphere amendment that adds all of the ALWSZ territory to the Windsor Water District sphere of influence, with the understanding that a subsequent reorganization involving all of the territory would require that Windsor Water become an independent special district

WEBB's approach centers on determining the project's critical path and working to complete the required tasks on schedule. The critical path item for this project will be completion of the cost-savings analysis for the reorganization of these two entities. Our approach to the RFP Scope of Work is as follows:

1. Kick-off meeting to establish lines of communication, schedule, and data needs request. All meetings related to this project will be held virtually.
 - We have budgeted for up to three kickoff meetings: one with LAFCO, one with LAFCO and Windsor Water, and a third with LAFCO and Sonoma Water
2. Collect the data necessary to answer the seven MSR determination questions and to answer the five SOI determination questions, as well as the four sphere change options listed in the RFP. This includes an MSR questionnaire sent to Windsor Water District and Sonoma Water.
3. If legal questions arise that need to be addressed in order to achieve the goals of the RFP, then Sonoma LAFCO will need to enlist legal counsel concurrent with our analysis to opine on said questions because WEBB cannot give legal advice.
4. Regularly meet with each agency to gather information (virtually).
 - We have budgeted 90 hours for project management and meetings to be billed on a T&M basis. If additional time is needed, then a budget augment may be requested
5. Analyze for inclusion in the MSR Report the four options stated in the RFP (i.e., no amendment; services contract between the two agencies; sphere amendment as proposed by the two agencies; and sphere amendment to add all of ALWSZ territory to Windsor Water).
6. Prepare the MSR and SOI Determinations and develop our findings.
7. Prepare administrative draft report for Sonoma LAFCO review, followed by a Public Review draft report for 30-day public circulation period, a response to public comments document, and a final draft report that incorporates public comment. WEBB and WMF will make one virtual presentation for the Sonoma LAFCO Commission.

Section 6. Conflict Disclosure

WEBB and WMF have no conflicts of interest with the local agencies in Sonoma County to disclose.

Section 7. Assistance Identification

Confirm the following boundaries and provide accurate shapefiles of each:

- Spheres of Influence boundaries and sewer service area boundaries for Windsor Water District and Sonoma Water
- Shapefiles of County, City, and Town of Windsor boundaries
- Shapefiles of ALWSZ boundary
- Growth projections of study area
- General Plan land use maps of study area
- Example MSR questionnaire that Sonoma LAFCO has used in the past
- Prior studies prepared for the study area
- Preferred report template
- Sonoma LAFCO logo

Section 8. Project Schedule

WEBB’s approach to project scheduling centers on determining the project’s critical path and working to complete the required tasks to achieve the schedule. Based upon our experience with similar projects, we have established a schedule goal as shown in the preliminary project schedule. We have included the milestone tasks as specified by Sonoma LAFCO and we understand that time is of the essence.

The key driver to maintaining the project schedule will be the prompt delivery and thoroughness of requested data to WEBB from Sonoma LAFCO, Windsor Water District, and Sonoma Water.

WEBB’s assembled team is prepared to deliver the administrative draft report for this project no later than one year from notice to proceed. The Contract Manager, Autumn DeWoody, will continually review the project schedule, project budget, and work completed to date. The contract manager will then discuss the results of this review with Sonoma LAFCO and provide updates regularly.

Preliminary Schedule

Task	Start
Contract Award and Notice to Proceed	June 14, 2024
Kick-Off Meeting	July 2024
Data Gathering and MSR questionnaire to participating agencies Analysis of four Sphere Change Options MSR Determination Results SOI Determination Results	July to November 2024
Internal QC	December 2024
Administrative Draft Report for Sonoma LAFCO	January 2025
Incorporate Sonoma LAFCO Comments	February 2025
Administrative Draft Report for Windsor Water District and Sonoma Water	February 2025
Incorporate Agency Comments	March 2025
30-Day Public Review Period	March to April 2025
Response to Comments Document	April 2025
Final Draft Report to Commission	May 2025

Section 9. Project Team Availability

We assure that our key personnel will be available as proposed throughout the project's duration. We understand and acknowledge the importance of continuity and commit to not removing or replacing any designated 'key' personnel without prior written approval from Sonoma LAFCO. Our technical team is made up of experienced professionals who are strong in all planning, engineering, municipal finance, GIS, and environmental consulting services, including MSR and SOI updates. **WEBB is confident we can provide services Sonoma LAFCO can rely on.**

Section 10. Anticipated Project Cost



20240272-Sonoma LAFCO Municipal Service Review, Sphere of Influence Update for Windsor Water District

Item	Description						Total Hours		WEBB Municipal Finance	WEBB Municipal Finance	WEBB Municipal Finance	Subtotal - Sub-consultant Labor (No Mark-up)	Total/task ¹
	Associate Assigned	Drachsin, Chandler	Sackett, Bradley A.	DeGano, Cheryl	DeWoody, Autumn	Waters, Virginia C.		Subtotal - WEBB Labor	Schoeppe, Heidi	McCarvel, Charmaine	Benali, Nadia		
	Classification	Assistant V	Principal II	Principal II	Associate II	Assistant II			Principal II	Senior I	Assistant V		
	Billout Rate	\$ 196	\$ 312	\$ 312	\$ 229	\$ 147			\$ 312	\$ 258	\$ 196		
		28	21	72	197	66	384	\$ 89,319	71	88	88	\$ 62,104.00	\$ 151,420
Task 1	Project Initiation (3 Kickoffs with LAFCO, then WWD, then Sonoma)	2	6	6	6	6	26	\$ 6,392	6	6	6	\$ 4,596	\$ 10,990
Task 2	Data Collection & Document Review (questionnaire)	8	2	8	20	16	54	\$ 11,620	12	30	30	\$ 17,364	\$ 28,980
Task 3	Analysis of 4 Sphere Change Options	8	8	16	40	16	88	\$ 20,568	10	20	20	\$ 12,200	\$ 32,770
Task 4	Administrative Draft Report (additional analysis, findings for MSR, SOI)	4	2	16	20	16	58	\$ 13,332	5	20	20	\$ 10,640	\$ 23,970
Task 5	Public Review Draft Report (include agency comments, and virtual presentation to Commission)	4	2	8	16	8	38	\$ 8,744	8	5	5	\$ 4,766	\$ 13,510
Task 6	Final Report (include response to comments and virtual presentation of final to Commission)	2	1	8	15	4	30	\$ 7,223	10	7	7	\$ 6,298	\$ 13,520
Task 7	Project Management (T&M) (1 hr/month x 12 months for agendas/minutes/report covers)			10	80		90	\$ 21,440	20			\$ 6,240	\$ 27,680
Total		28	21	72	197	66	384	\$ 89,319	71	88	88	\$ 62,104	\$ 151,420

1. Rounded to the nearest \$10.
2. Sub-consultants include WMF

Section 11. Example MSR/SOI Study

Please see below QR Code for an example of MSR Study WEBB has prepared: [IEUA Plan For Service](#)



Please see below QR Code for an example of MSR Study WEBB has prepared: [Niland Service Area Plan](#)

