



“We serve as an extension of our clients’ staff, augmenting existing personnel by providing specialized expertise.”

Willdan Financial Services

- Utility Rate Analysis
- Fiscal Impact Analysis
- User Fee (Cost of Service) Studies
- Cost Allocation Studies
- Development Fee Studies
- Facility Financing Plans
- Annexation and Incorporation Studies
- Special District Formation and Administration
- Continuing Municipal Disclosure Services
- Arbitrage Rebate Services

City of Sacramento, Transportation Development Impact Fee

Program — Willdan Financial Services and subconsultants specializing in public outreach and transportation engineering are assisting the City with the adoption of its first citywide impact fee for roadway, pedestrian, bikeway, and transit improvements required to serve new development. The project involves nearly a dozen workshops and advisory meetings with the City Council, business and development interests, and community groups, in addition to an extensive technical effort that supports the City’s new 2030 General Plan.

Orange County Transportation Authority (OCTA), Environmental Cleanup Funding Guidelines Development

— In 2008, Orange County, California renewed a measure (Measure M) that was originally established to increase sales tax to generate funds for transportation projects. The renewal generated specific funds to be used for environmental cleanup programs associated with storm water runoff from the County’s various streets and highway systems. Willdan is assisting OCTA with developing program and policy guidelines for the distribution of these funds over the next 30 years. Our staff provides technical assistance at environmental policy committee meetings, and will present final policy recommendations to the Board for approval and adoption.

City of Burlingame, Storm Drain Fee Initiative

— The City identified \$40 million in infrastructure improvements that would be necessary to alleviate severe flooding conditions throughout the community. In order to maintain existing service levels for City operations funded by an increasingly constrained General Fund, the City decided to pursue an alternate financing mechanism under the mandates of Proposition 218. Willdan assembled and led a diversified consulting team to oversee a turn-key project to implement a new storm drain fee. The project required engineering, financial, polling and public outreach expertise. Willdan developed a fee rate structure that was equitable, proportional to the benefit received by affected properties, and technically defensible, and was ultimately successful in obtaining a 63% voter approval for its implementation.

City of Pomona, Business Improvement District Formation

— Willdan assisted the City with the successful establishment of a Property Business Improvement District (PBID) in the Downtown Pomona area. The objective of the PBID was to provide private security, additional maintenance, marketing and promotional activities, special events coordination, economic development programs, and administrative, legal and technical support. Willdan prepared an Engineer’s Report

Willdan has had two primary objectives since our inception in 1964—ensuring the success of our clients and enhancing our surrounding communities. Working steadily toward these goals we gained a notable reputation for technical excellence, cost effectiveness, and client responsiveness in providing superior engineering and planning consulting services. In recent years Willdan has expanded our service offerings into several vital areas including financial and economic analysis, homeland security, environmental remediation, and sustainability. We have crafted this set of integrated services so that, in the face of our evolving environment—whether economic, natural, or built—Willdan can continue to extend the reach and resources of our clients.

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Willdan Financial Services

specializes in providing revenue generation, enhancement, and administration services to public agencies. We are a service-oriented firm that delivers a high quality product to public agencies—and ultimately, to the public. We serve as an extension of our clients' staff, augmenting existing personnel by providing specialized expertise. Our clients include more than 800 cities, counties, state agencies, port authorities, housing agencies, special districts, and school districts in more than 38 states. We further support our clients by conducting year-round workshops and on-site training to assist them in keeping current with the latest developments in our areas of expertise.

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and Management District Plan, and conducted a Proposition 218 ballot proceeding for the approval of the PBID. Following the successful formation and balloting, the district methodology was challenged in court by a property owner in the district. The methodology was found to be sound and appropriate, and was ultimately upheld through several appeals, including a remand from the California Supreme Court. The remand was based upon a stricter standard of review that was required as the result of another important case decided in the summer of 2008.

City of Irvine, Cost Allocation Plan and User Fee Study — Willdan prepared a full cost allocation plan (CAP) for the City in order to analyze and identify all central service departments' expenditures, and to determine the appropriate allocable direct and indirect costs for those central services. We then calculated the fully burdened hourly rates and blended rates for City personnel directly involved in providing services. This information was used to establish the City's full cost of providing services and then to calculate a revised fee schedule. Willdan recommended appropriate full cost recovery and subsidy fee levels for implementation and adoption by the City.

City of North Port, Florida, Development of a Fire Assessment Methodology — Willdan was retained to work closely with District staff to analyze their existing fire assessment program and prepare a fully defensible Non Ad Valorem assessment methodology compliant with Florida legal requirements. We prepared an assessment allocation and apportionment methodology that accounted fully for capital infrastructure and operational funding requirements. The new assessment methodology was successfully approved and implemented by the City of North Port.

City of Sacramento, Utilities Impact Fee Study — Willdan is currently assisting the City with the adoption of a new drainage fee and revised sewer and water connection charges for the City of Sacramento's Department of Utilities. Once adopted, these fees will support citywide rehabilitation and replacement capital projects in a real estate market that will emphasize private and public investment in infill, higher density, and redevelopment growth. Willdan was engaged to help the City prepare updated fees that would provide the required funding needed, be technically sound and politically acceptable. Willdan's team for the project includes a communications consultant to facilitate input and buy-in from key stakeholders including major developers, business organizations, and other City departments, increasing the chances for fee adoption by the City Council.

Dixon Public Library District, Five-year Impact Fee Report — California state law under the Mitigation Fee Act contains implementation and accounting procedures that require an updated report be prepared every five years in order to make findings regarding the purpose and use of impact fee revenue. This report should also identify the sources of other funding needed to complete fee program improvements. Willdan is working with District staff to prepare a report that ensures compliance with California state law; demonstrates responsible accounting practices to the public and the entity collecting impact fees on its behalf (Solano County); and provides transparency to the public and building industry regarding collection and use of impact fee revenues.

