

*Placentia Library
District
Impact Fee Study*

September 18, 2006

Marshall Eyerman

Toyasha Black



**Project
Management
Analysis**



**Data
Management**

**Information
People Count**

Project Management

Analysis

\$5,554,231.96	\$57,323.27
\$2,512,759.93	\$23,140.96
\$76,342,763.61	\$620,271.18
\$578,724.67	\$8,714.92
\$439,427.38	\$4,723.12
\$206,654.56	\$2,168.33
\$7,358,231.53	\$71,678.03
\$3,758,032.47	\$31,140.92
\$412,591.45	\$4,577.16
\$77,455,819.27	\$159,240.68
\$1,537,918.07	\$3,879.14

Data Management

\$2,532.86
1,002.27

Information

People Count

Introduction to MuniFinancial

- Muni Team:
 - ✓ Marshall Eyerman, Project Manager
 - ✓ Toyasha Black, Senior Analyst
 - ✓ Staff Support, Temecula Office
- Muni Experience:
 - ✓ One of the largest public sector financial consulting firms in the United States
 - ✓ Extensive experience in providing a wide range of local agency financial services, including development impact fee studies, to similarly sized agencies across the nation

Project Management

Analysis

\$1,024,201.96 \$57,328.27

\$2,512,789.96 \$23,140.96

\$76,242,763.61 \$630,271.18

\$976,724.67 \$8,714.92

\$433,427.98 \$4,723.12

\$206,654.58 \$2,168.53

\$3,553,231.53 \$51,676.93

\$6,758,032.47 \$31,140.92

\$3,142,561.46 \$3,557.46

\$7,456,819.37 \$139,240.68

\$1,567,918.07 \$9,679.14

Data Management

\$3,532.86

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Information

People Count

Project Objectives

- Develop fee justification based on the “reasonable relationship” and “deferential review” standards established by the courts
- Provide a schedule of maximum-justified fees by land use category
- Present the results of the study in a clearly written report in compliance with the *Mitigation Fee Act* (California Government Code 66000 to 66025)
- Provide comprehensive backup documentation for assumptions, including copies of spreadsheet files, to enable District staff to update fees in the future

Project
Management

Analysis

\$5,864,231.96 \$57,328.27

\$2,512,769.93 \$23,140.58

\$78,342,763.87 \$580,271.18

\$978,724.67 \$8,714.92

\$439,427.98 \$4,723.12

\$206,654.53 \$2,163.95

\$5,558,237.53 \$51,678.83

\$8,758,032.47 \$31,140.92

\$2,142,504.65 \$2,552.71

\$7,456,819.27 \$152,240.67

\$1,567,918.07 \$9,879.14

Data
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\$0,532.06

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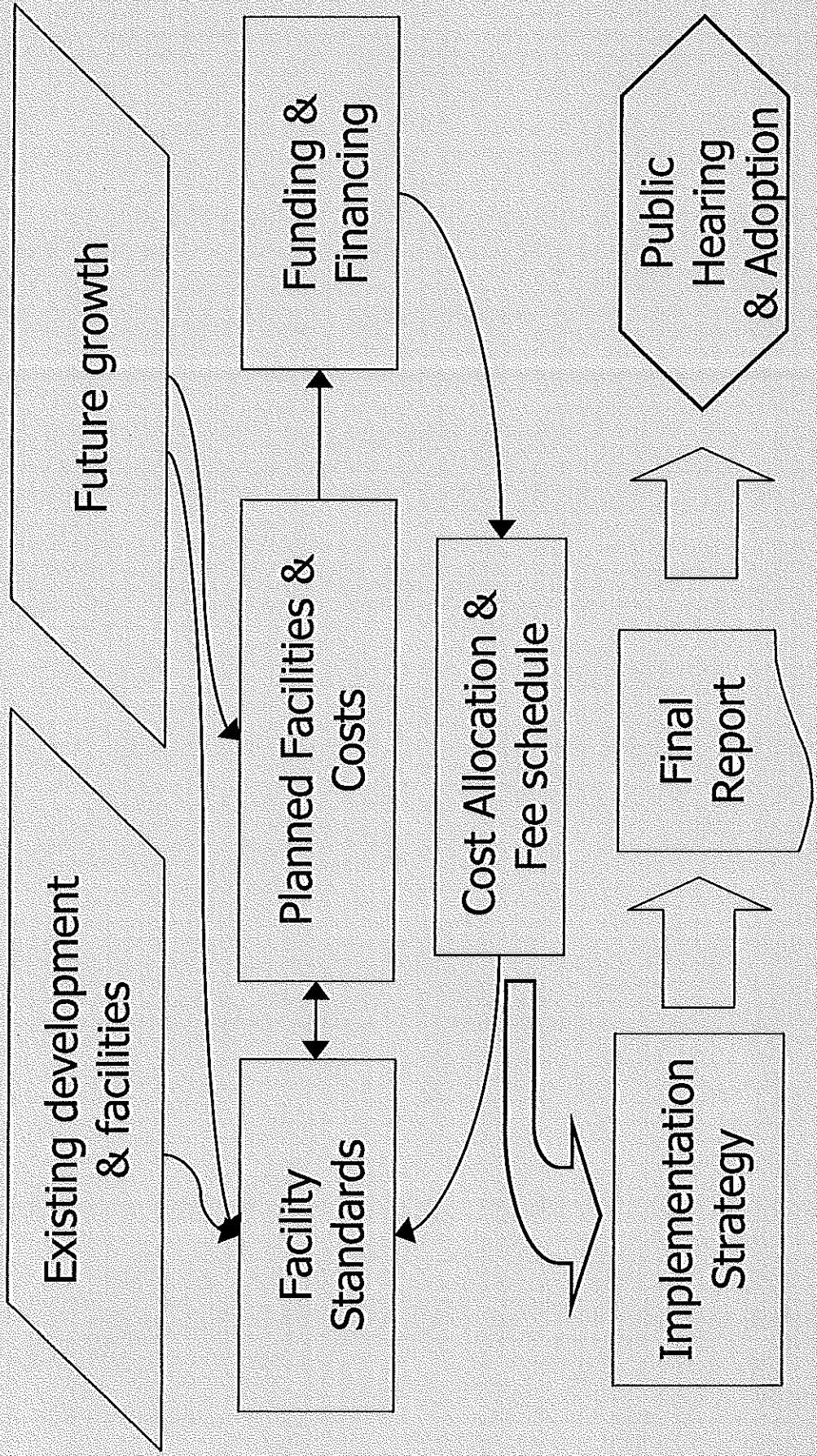
Information

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Mitigation Fee Act Findings (Govt. Code §66001)

- Purpose of fee
 - ✓ Reference General Plan goals and objectives
- Use of fee revenue
 - ✓ General description, maintain flexibility
- “Dual Nexus”
 - ✓ Need: Development ≈ Need for facilities
 - ✓ Benefit: Development ≈ Use of revenue
- Rough Proportionality: Fee amount ≈ development’s share of facility costs

Impact Fee Approach Overview



Project
Management

Analysis

\$6,824,231.56 \$57,328.27

\$2,512,769.53 \$23,140.56

\$78,342,763.81 \$530,271.18

\$978,724.67 \$8,714.52

\$439,427.36 \$4,723.12

\$205,654.56 \$2,168.53

\$5,533,231.53 \$51,673.63

\$3,758,032.47 \$31,140.92

\$219,581.45 \$2,557.46

\$17,456,819.27 \$150,240.58

\$1,567,918.07 \$9,979.14

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\$8,532.96

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Information

People Count

Methodology for Calculating Public Facilities Fees

- Determine growth projections
- Identify facility standards
- Determine the amount and cost of facilities required to accommodate new development
- Calculate the public facilities fee by allocating the total cost of facilities per unit of development

The Metric: Components of Service Standards

Demand Standard

- Usually based on physical measure of demand and facilities.
- Examples: Traffic LOS, Park Acres/1k, Gallons per Day.

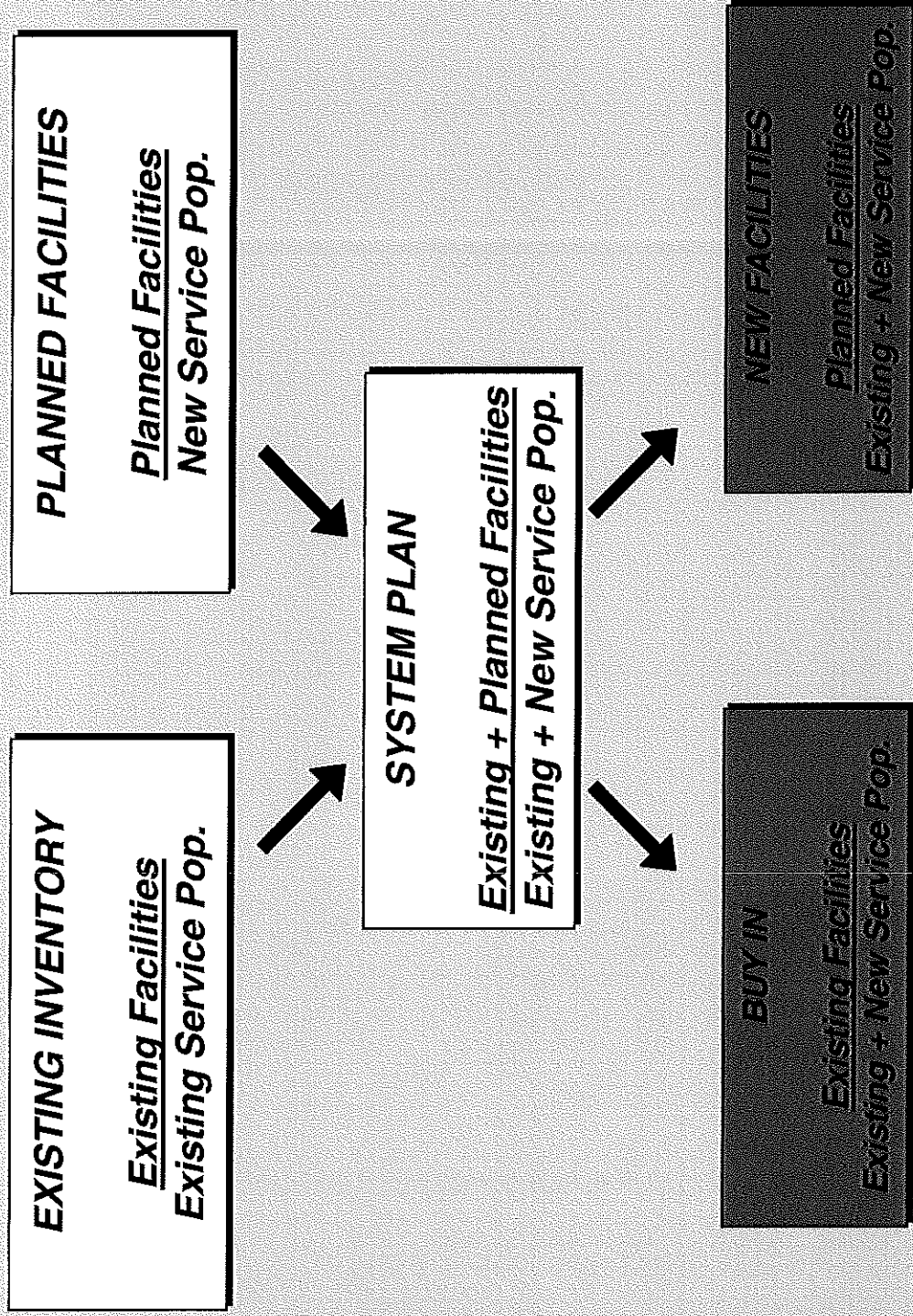
Design Standard

- Specific design standard to meet stated service goals.
- Allows design for “what could be.”
- Accommodate changes in building codes, state, and federal mandates

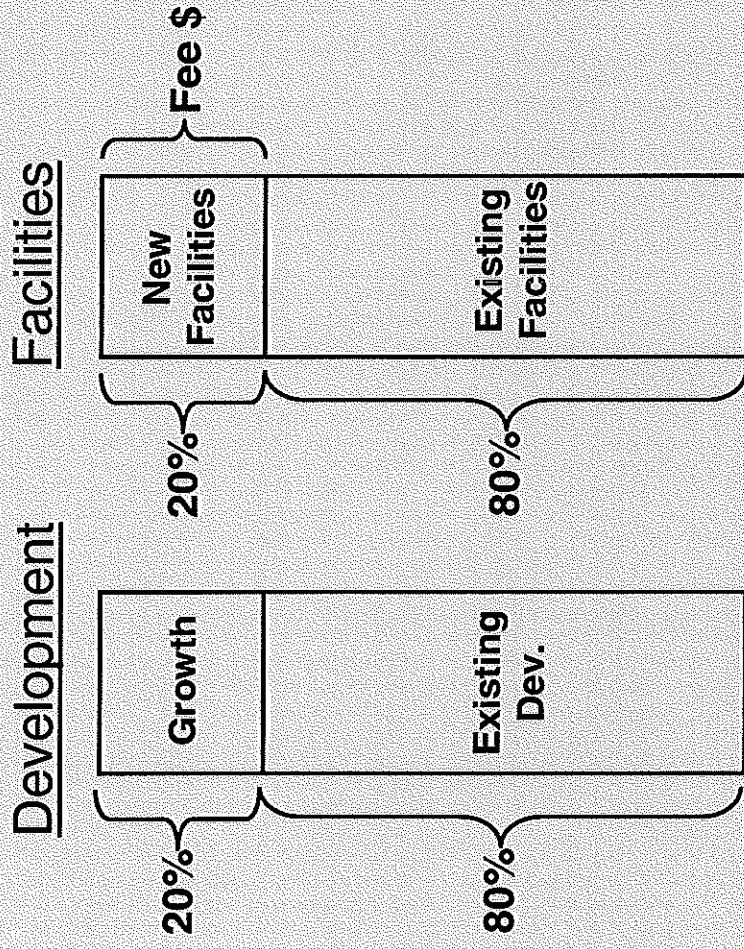
Cost Standard

- Converts demand and design standards into costs per unit.
- Examples: Cost per Peak P.M. Trip, Cost per capita, etc...

Facility standards depend on WHO needs WHAT



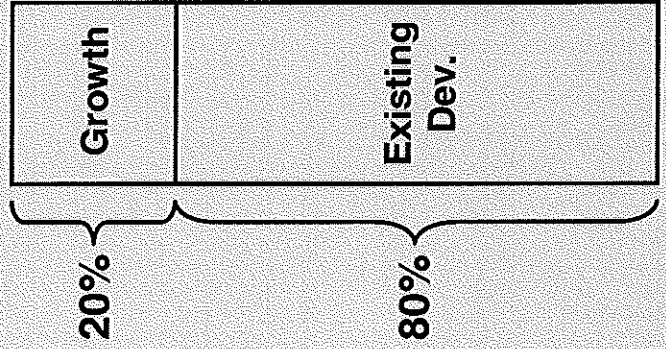
Existing Inventory Approach



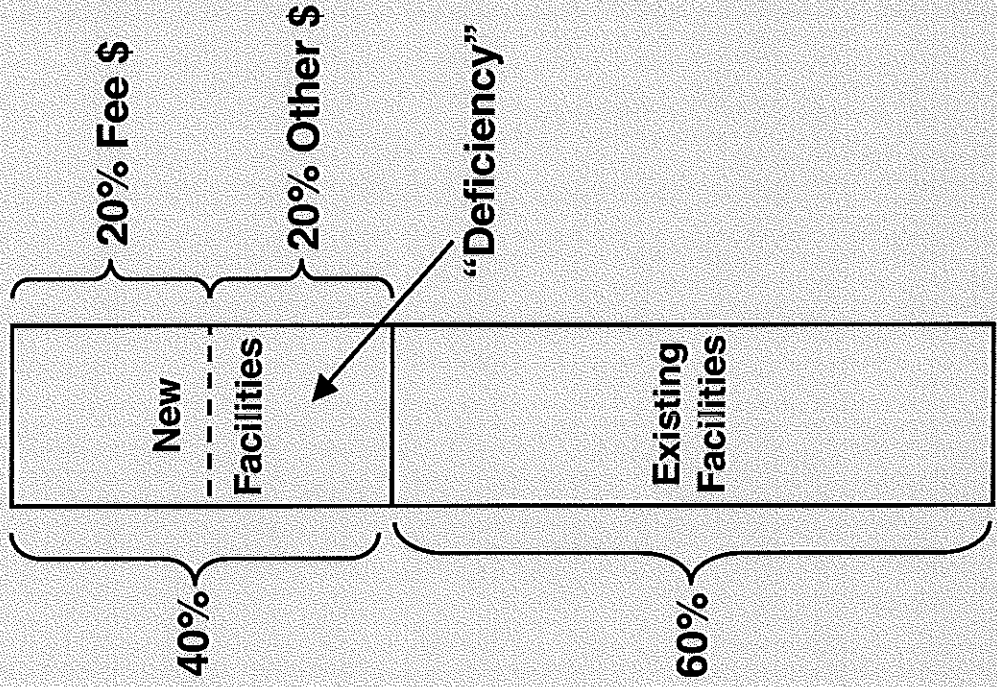
- Provides funds to maintain existing facility standards
 - Often used when no other planning studies available
 - Simple intuitive methodology
 - Highly defensible to legal challenge

System Plan Approach

Development



Facilities



- Enables new development to assist in raising facility standards
 - Higher fee, more revenue compared to Existing Inventory approach
 - Used when you can't separate out facilities that serve existing versus new development
 - Often based on a master plan or other list of planned capital projects
 - Need to fund "deficiency" with non-fee \$, but exact requirements unclear

Project Schedule

	Month 1	Month 2	Month 3
Task 1. Identify and Resolve Policy Issues			
Task 2. Identify Existing Development and Future Growth			
Task 3. Calculate Facility Standards			
Task 4. Determine Potential Facility Needs and Costs			
Task 5. Identify Funding and Financing Alternatives			
Task 6. Prepare Report			

Project
Management

Analysis

\$5,954,231.96 \$57,928.27

\$2,512,768.93 \$23,140.96

\$78,342,763.81 \$680,271.18

\$878,724.67 \$8,714.92

\$439,427.38 \$4,723.12

\$206,654.58 \$2,169.93

\$5,553,231.53 \$51,678.05

\$3,758,032.47 \$31,140.92

\$240,544.45 \$2,527.42

\$7,456,619.27 \$759,249.65

\$4,557,918.07 \$39,879.14

Data
Management

\$9,532.96

\$1,002.27

Information

People Count

Questions and Answers



September 18, 2006

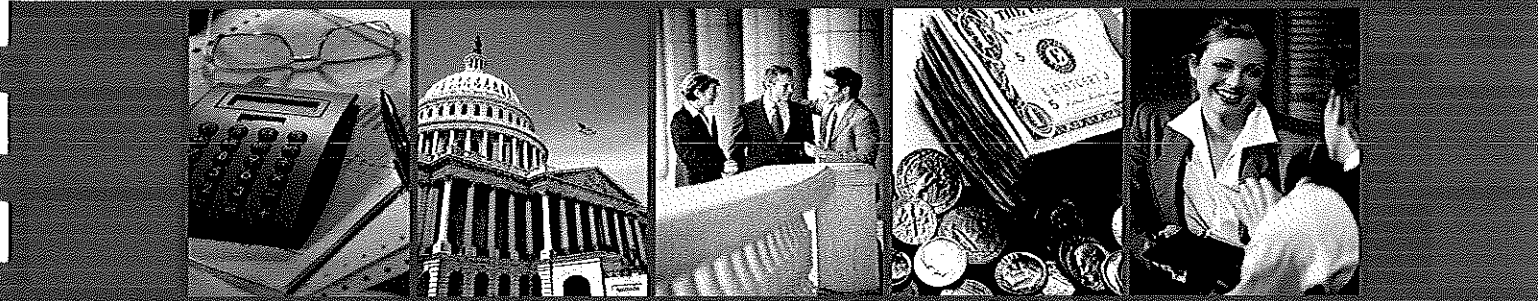
Placentia Library District

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*MuniFinancial Proposal to
Placentia Library District*

*Impact Fee Documentation
for Library Facilities*



27368 Via Industria, Suite 110, Temecula, California 92590

September 12, 2006

Ms. Elizabeth D. Minter
Library Director
Placentia Library District
411 East Chapman Ave.
Placentia, California 92870

Re: Prepare Impact Fee Documentation for Library Facilities

Dear Ms. Minter:

MuniFinancial is pleased to submit this proposal to prepare impact fee documentation for library facilities for the Placentia Library District.

MuniFinancial is one of the largest public-sector financial consulting firms in the United States, with headquarters in Temecula and regional offices in Oakland, Lancaster, and Sacramento. In our 18-year history we have helped hundreds of public agencies and nonprofit organizations successfully address financial challenges. We have extensive experience in a wide range of local agency financial services, including development impact fee studies.

The project team we have assembled for the Placentia Library District includes Mr. **Robert D. Spencer**, Principal Consultant, and Ms. **Sally Van Etten**, Senior Project Analyst, who will serve as technical advisors. Mr. **Marshall Eyerman** will serve as principal-in-charge and project manager for this engagement. Ms. **Quennelle Quartararo** and Ms. **Toyasha Black** will provide analytical support. I am certain that this team can successfully partner with your staff to prepare a fee analysis that equips the District to provide for the impact of development.

We are excited about this opportunity to provide the Placentia Library District with the excellent service for which MuniFinancial is known. Please do not hesitate to contact Marshall Eyerman at (951) 587-3562 or via email to marshalle@muni.com if you have any questions regarding this proposal.

Sincerely,
MuniFinancial



Brian Jewett, Division Manager
Financial Consulting Services Group

Enclosure

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EXECUTIVE SUMMARY

This section explains the project objectives, our approach to development impact fee programs, and how that approach would be applied to the Placentia Library District.

PROJECT OBJECTIVES

The objectives of this project are to:

- ◆ Develop fee justification based on the “reasonable relationship” and “deferential review” standards established by the courts;
- ◆ Provide a schedule of maximum-justified fees by land use category;
- ◆ Present the results of the study in a clearly written report in compliance with the *Mitigation Fee Act* (California Government Code 66000 to 66025); and
- ◆ Provide comprehensive backup documentation for assumptions, including copies of spreadsheet files, to enable District staff to update fees in the future.

SUMMARY OF APPROACH

MuniFinancial’s methodology for calculating public facilities fees is simple and flexible. We calculate the maximum justifiable impact fee and provide the flexibility for the District to impose fees up to that amount. The program incorporates local policy priorities and is simple to explain to elected officials, interest groups and the public.

Our overall methodology is straightforward: we efficiently apply our financial and engineering expertise to develop technically defensible fee documentation that is easily understood by the development community and the public. We take advantage of the flexibility that statutes and case law provides in establishing the nexus between new development and area-wide fee programs to avoid excessive engineering costs on our part.

Development impact fees are calculated to fund the cost of facilities required to accommodate growth. The four (4) steps followed in an impact fee study include:

1. Determine growth projections appropriate for use in study;
2. Identify facility standards;
3. Determine the amount and cost of facilities required to accommodate new development based on facility standards and growth projections; and
4. Calculate the public facilities fee by allocating the total cost of facilities per unit of development.

The identification of facility standards in step #2 often involves preparing an inventory of existing facilities and identifying specific planned facilities. This data is needed to provide a basis for the calculation of facility standards.

Step #3 may include identification of and cost estimates for existing facility deficiencies. Depending on the facilities standards chosen, existing development may have a responsibility to provide additional facilities to meet the same standards being applied to new

development. The cost of these deficiencies cannot be funded by impact fee revenues and requires identification of alternative funding sources.

FACILITY STANDARDS

The key public policy issue in development impact fee studies is the identification of facility standards. Facility standards document a reasonable relationship (1) between new development and the total need for new facilities, and (2) between each development project and the impact fee for that project. Standards also ensure that new development does not fund deficiencies associated with existing development.

TYPES OF FACILITY STANDARDS

The types of standards that may be used in a development impact fee study include:

- ◆ ***Demand standards*** determine the amount of facilities required to accommodate growth. These standards are the most common method for discussing policy options with regards to public facility fees.
- ◆ ***Design standards*** determine how a facility should be designed to meet expected demand. These standards are typically not evaluated as part of an impact fee analysis, but they can have a significant impact on the cost of facilities.
- ◆ ***Cost standards*** determine the cost per unit of demand based on the estimated cost of facilities. Impact fee studies often convert the other two (2) standards discussed above to a cost standard to generate an impact fee schedule.

METHODS FOR DETERMINING FACILITY STANDARDS

The most commonly accepted approaches to determining a facility standard are described below.

- ◆ The **existing inventory method** uses a facility standard based on the ratio of existing facilities to the existing service population. Under this approach new development funds the expansion of facilities at the same standard currently serving existing development. By definition the existing inventory method results in no facility deficiencies attributable to existing development. This method is often used when a long-range plan for new facilities is not available. Only the initial facilities to be funded with fees are identified in the fee study. Future facilities to serve growth are identified through an annual capital improvement plan and budget process.
- ◆ The **planned facilities method** calculates the standard solely based on the ratio of planned facilities to the increase in demand associated with new development. This method is appropriate when planned facilities only benefit new development. This method also may be used when there is excess capacity in existing facilities that can accommodate new development. In that case new development can fund facilities at a standard lower than the existing inventory standard and still provide an acceptable level of facilities.
- ◆ The **system method** calculates the standard based on the ratio of existing plus planned facilities to total future demand (existing and new development). This method is used when (1) the local agency anticipates increasing its facility standard above the existing inventory standard discussed above, and (2) planned

facilities are part of a system that benefit both existing and new development. Using a facility standard that is higher than the existing inventory standard creates a deficiency for existing development. The jurisdiction must secure non-fee funding for that portion of planned facilities required to correct the deficiency.

Some impact fee programs require specialized engineering studies to identify facility needs. If adequate engineering analysis is not available, we will work with the District to develop purposefully conservative preliminary fee calculations. The District can then adopt a fee program pending completion of the necessary engineering studies.

OTHER ELEMENTS OF APPROACH

INTEGRATION WITH LONG-RANGE CAPITAL IMPROVEMENT PLANS

An effective impact fee program must be integrated into the District's specific plans, master plans, and other long-range capital improvement plans (CIPs). We will review existing CIPs and see that the fee program addresses specific funding needs. We will work with staff to determine the need for impact of debt financing on the fee program. We can program fees to specific capital projects if necessary. However, we recommend that the fee program not be definitive in this regard and that the District program fees through its annual CIP process to provide as much flexibility as possible to meet changing circumstances.

Overall, our goal is to develop an impact fee program that effectively supports a financially feasible plan for facilities to accommodate growth.

DISTRICT, DEVELOPER AND PUBLIC PARTICIPATION

Gaining consensus among various groups requires a balanced discussion of both economic development and community service objectives. If the District deems necessary, we will facilitate meetings with representatives of the development industry to explain the program and gain input. Our goal is to create consensus first around the need for facilities and second around a feasible revenue strategy including the role of impact fees.

ECONOMIC DEVELOPMENT CONCERNS

The development community often is concerned that fees and other exactions will become too high for development to be financially feasible under current market conditions. We have developed a number of strategies to address this concern, including:

- ◆ Conducting an analysis of the total burden placed on development by exactions to see if development feasibility may be compromised by the proposed fees;
- ◆ Gathering data on total fees imposed by neighboring or competing jurisdictions;
- ◆ Developing a plan for phasing in the fees over several years to enable the real estate market to adjust;
- ◆ Providing options for developers to finance impact fees through assessment and other types of financing districts; and
- ◆ Imposing less than the maximum justified fee.

If less than the maximum justified fee is imposed we will work with staff to see that that the Capital Improvement Plan (CIP) is adjusted to compensate for the reduced fee revenue. The

CIP should remain financially feasible to maintain realistic expectations among developers, policy-makers and the public.

CONSOLIDATING FEE PROGRAMS

Recently we have been working with several clients to consolidate separate fee programs into a combined development impact fee. For example, this approach may combine police, fire, general government, and parks and recreation into a single “public facilities” fee. We also specialize in justifying single citywide fees rather than fees for separate zones. Advantages of these approaches include a stronger revenue stream that can fund individual projects sooner, less administrative and accounting complexity, and more flexibility in applying fee revenues to facility needs.

PROGRAM IMPLEMENTATION

Fee programs require a certain level of administrative support for successful implementation. We will recommend appropriate procedures such as:

- ◆ Regularly updating development forecasts;
- ◆ Regularly updating fees for capital project cost inflation;
- ◆ Regularly updating capital facility needs based on changing demands;
- ◆ Developing procedures for developer credits and reimbursements; and
- ◆ Including an administrative charge in the fee program.

SCOPE OF SERVICES

We want to ensure that our scope of work is responsive to the Placentia Library District's needs and specific local circumstances. We will work in concert with the District to adjust our scope of services as needed during the course of the study.

Below is our proposed scope of work described in detail by task. We explain how we will accomplish each task and identify associated meetings and deliverables.

TASK 1: IDENTIFY AND RESOLVE POLICY ISSUES

Objective: Identify and resolve policy issues raised by the study and determine appropriate facility and fee categories.

Description: We will work with Library District staff to identify and review all documentation supporting the potential new development impact fees. We will deliver information requests as appropriate. We will explain policy issues to District staff and seek guidance prior to proceeding. Policy issues include:

- ◆ Existence of ordinances, policies, and plans supporting the imposition of impact fees;
- ◆ Land use categories for imposition of fees;
- ◆ Allocation of cost burden to nonresidential land uses;
- ◆ Method for determining facility standard;
- ◆ Adequacy of existing studies and plans to identify needed facilities;
- ◆ Potential alternative funding sources such as rate revenues and grants, if needed;
- ◆ Funding existing deficiencies, if identified; and
- ◆ Implementation concerns and strategies.

Meetings: One (1) meeting to initiate the project, discuss data needs, and address policy issues.

Deliverables: (1) Information requests, (2) revised project scope and schedule (if needed), (3) brief summary of policy decisions (if needed).

TASK 2: IDENTIFY EXISTING DEVELOPMENT AND FUTURE GROWTH

Objective: (1) Identify estimates of existing levels of development, and (2) identify a projection of future growth consistent with current planning policy.

Description: Existing levels of development provide a basis for calculating existing facility standards, the basis for most development impact fees. Future growth to a defined planning horizon, such as 2026, provides a basis for calculating the amount of new facilities needed. Existing estimates and projections for a library district should be expressed in terms of dwelling units, resident

population, employment generators, and other criteria and measures of the service population for facility planning.

We will work with the Orange County Planning Department to obtain planning horizon development numbers over which the costs will be apportioned. We will evaluate projections from regional metropolitan planning agencies and other available sources. We will obtain approval of the future development quantities from the department.

We will obtain approval of estimates of existing development and development projections from the District prior to proceeding. These estimates and projections are essential inputs to the funding plan and fee calculation model constructed in the tasks that follow. Consequently, changes to these estimates or projections by the District following approval could result in a change in this scope of services and increase in our professional fees.

Meetings: None.

Deliverables: Memorandum to District staff summarizing estimates of existing development and projections for new development.

TASK 3: CALCULATE FACILITY STANDARDS

Objective: Determine standards to identify facilities required to accommodate growth.

Description: Facility standards provide a critical link in documenting the nexus between growth, the facilities required to accommodate it, and a defensible impact fee. We will use one (1) of three (3) standard approaches to determining facility standards: (1) existing inventory, (2) system (existing plus planned facilities), or (3) planned facilities only.

Depending on the approach being taken to calculate facility standards we may need lists of existing and/or planned facilities. Alternately we may need documents that indicate District policy and facility planning assumptions regarding standards (master plans, specific plans, general plans, etc.).

We will express facility standards as measures of demand by land use category. These measures, such as “equivalent dwelling units” or “population and employment densities,” apportion facility costs to development projects and generate the fee schedule. A range of reasonable and technically defensible approaches exists for this purpose. We will select the appropriate approach for each facility standard based on:

- ◆ Available local data on facility demand by land use category;
- ◆ Approaches used by other agencies; and
- ◆ Support for other District policy objectives.

Meetings: None.

Deliverables: None.

TASK 4: DETERMINE POTENTIAL FACILITY NEEDS AND COSTS

Objective: Identify the type, amount and cost of facilities required to accommodate growth and correct deficiencies, if any.

Description: The facility standards developed in Task 3 will also be integral to estimating facility needs. If the “system” or “planned facilities only” approach is used to develop facility standards (see Task 3) we will need a list of specific planned facilities from existing facility master plans or other District documents. If the “existing inventory” approach is used then we will only need an indication of the initial projects anticipated for the use of fee revenues.

A critical component of this task that we will complete will be to distinguish between the following:

- (1) Facilities needed to serve growth (that can be funded by impact fees); and
- (2) Facilities needed to correct existing deficiencies for the existing service population (that cannot be funded by fees).

To the extent possible we will use facility standards (Task 3) applied to planned projects to identify existing deficiencies. **This scope of work does not include additional engineering analysis if needed to identify deficiencies.**

To estimate costs for new facilities, we will identify unit cost components such as design costs, land acquisition, and construction as appropriate. We will develop planning-level estimates for each unit cost based on actual District experience, other local cost data such as land values, consultant team experience from prior projects, and industry cost indices

Meetings: None.

Deliverables: None.

TASK 5: IDENTIFY FUNDING AND FINANCING ALTERNATIVES

Objective: Determine the extent of alternative (non-fee) funding available for new facilities.

Description: If impact fees are going to only partially fund a capital project, the *Mitigation Fee Act* requires that the agency report on the anticipated source and timing of the additional funding every five (5) years. There are two (2) types of alternative funding sources that we will identify:

1. Funding from non-impact fee sources to correct existing deficiencies; and
2. Funding from new development other than impact fees that must be credited against new development's impact fee contributions, possibly including taxes paid to finance facilities.

We will identify anticipated alternative funding based on information from District staff, or note that funds are still to be identified. In the case of the latter, we will note probable funding alternatives.

We expect that facilities would be funded predominantly on a pay-as-you-go basis. If fees will contribute to funding debt service we will apportion financing costs to the fee program based on the appropriate share of total costs. However, we do not expect the timing of fee revenues to affect financing costs so a cash flow analysis is not included in this scope of work.

Meetings: None.

Deliverables: None.

TASK 6: PREPARE REPORT

Objective: Provide technically defensible fee report that comprehensively documents project assumptions, methodologies, and results.

Description: Based on the results of prior tasks we will first prepare a package of draft report tables for District staff to review. The tables will document each step of the analysis. The tables will culminate in a schedule indicating the maximum justified fee amount by land use category.

Following one (1) round of comments from District staff on the quantitative analysis and fee schedule, we will prepare an administrative draft report. Following one (1) round of comments on the administrative draft we will prepare a public draft for presentation to interested parties, the public, and the District Board of Directors. We will prepare a final report if necessary based on one (1) round of comments received on the public draft report. We will submit up to ten (10) bound copies of each report as requested by the District. We can also post the report on our web site for access via the Internet.

If requested, we will provide legal counsel with copies of fee resolutions and ordinances used by other jurisdictions.

Meetings: Two (2) meetings: one (1) to review the initial project results (report tables) and the draft report with staff; and one (1) to present the report at a public hearing for adoption.

Deliverables: Administrative draft report, public draft report, final report (if needed), and slide presentation (if needed).

PROJECT SCHEDULE

We will deliver the draft report tables described at the beginning of Task 6 within 90 days after receiving authorization to proceed.

To meet the schedule outlined below we will expect responses to policy issues and information requests within five (5) business days. If there are delays on the part of the District, we will need to adjust our project schedule accordingly.

We will develop specific project timelines following consultation with and in concert with District staff.

PLACENTIA LIBRARY DISTRICT IMPACT FEE DOCUMENTATION FOR LIBRARY FACILITIES PROJECT SCHEDULE			
	Month 1	Month 2	Month 3
Task 1. Identify and Resolve Policy Issues			
Task 2. Identify Existing Development and Future Growth			
Task 3. Calculate Facility Standards			
Task 4. Determine Potential Facility Needs and Costs			
Task 5. Identify Funding and Financing Alternatives			
Task 6. Prepare Report			

FEES FOR SERVICES

We will perform an impact fee study for Placentia Library District for a *fixed price fee of \$10,500*. Engineering analysis/expertise and associated development projections to identify new facilities or update facility cost estimates is not included in our fee.

INVOICING

MuniFinancial will invoice the Placentia Library District monthly for our services, based on project completion.

PROJECT EXPERIENCE

MuniFinancial is one of California's leading firms for development impact fee programs. The firm has broad experience reviewing and structuring impact fee programs for cities, counties, special districts, and school districts. For these clients, our firm has provided nexus documentation to support fees funding a full range of public facilities, including utilities (water, wastewater and storm drainage), roadways and transit, parks, fire, police, health clinics, and other government facilities such as civic center and corporation yards.

Our depth of experience in this arena has led us to develop a range of creative, defensible programs for our clients. To increase the flexibility of impact fee programs we have justified a single fee that funds a wide range of facilities, from parks to fire stations (City of Gilroy, City of Roseville). We also specialize in development of fee programs that span multiple jurisdictions to fund regional facilities (counties of El Dorado, Fresno, San Luis Obispo, and Solano). Our staff has served as expert witnesses for local agencies defending their fee programs, while no fee program developed by MuniFinancial has been challenged in court.

Finally, clients have engaged our firm to examine critical policy issues often raised by impact fee programs, and to communicate these issues to elected officials, the development community, and the public. To address the effect of fees on economic growth we have performed development feasibility and real estate market studies, conducted fee comparison surveys, and compared public facility funding methods among local agencies.

A partial listing of the jurisdictions for which MuniFinancial has conducted development impact fee studies includes:

MUNIFINANCIAL DEVELOPMENT IMPACT FEE STUDIES PARTIAL CLIENT LIST	
City and County of San Francisco	City of Santa Clarita
City of Bellflower	City of Shasta Lake
City of Carpinteria	City of Sierra Madre
City of Covina	City of Soledad
City of Chula Vista	City of South San Francisco
City of Dublin	City of Stockton
Town of Eagar, AZ	City of Tracy
City of El Monte	City of Upland
City of El Segundo	Town of Windsor
City of Fresno	Town of Yucca Valley
City of Gilroy	Coachella Valley Association of Governments
City of Goodyear, AZ	Contra Costa Fire Protection District
City of Hawthorne	County of El Dorado
City of Hercules	County of Fresno
City of Hollister	County of Kern
City of Huntington Beach	County of Kings
City of Huntington Park	County of Madera
City of Indian Wells	County of Placer

**MUNIFINANCIAL
DEVELOPMENT IMPACT FEE STUDIES
PARTIAL CLIENT LIST**

City of Kingsburg	County of Solano
City of La Mesa	County of Stanislaus
City of Livermore	Dixon Library District
City of Long Beach	East Contra Costa Fire Protection District
City of Novato	Keyes Fire Protection District
City of Oakley	Mt. Diablo Fire Protection District
City of Oxnard	Novato Fire Protection District
City of Palmdale	Rincon Valley Fire Protection District
City of Phoenix, AZ	Sacramento Area Flood Control Agency
City of Pittsburg	Salida Fire Protection District
City of Redding	San Joaquin Area Flood Control Agency
City of Reedley	San Ramon Fire Protection District
City of Redlands	Stanislaus Consolidated Fire District
City of Rialto	Tehachapi Valley Rec. & Park District
City of Rocklin	Windsor Fire Protection District
City of Roseville	Woodland Fire Protection District
City of San José	San Diego Association of Governments
City of San Leandro	Coachella Valley Association of Governments
City of San Luis Obispo	Los Angeles Metropolitan Transportation Authority

MuniFinancial has specific expertise preparing development impact fee documentation as part of a comprehensive public facility financing plan. Our approach includes:

- ◆ Close coordination with public agencies, developers and public interest groups to devise a consensus approach.
- ◆ Sensitivity to equity concerns between new and existing development, as well as between different land uses and phases of development.
- ◆ Developing strategies to maintain project financial feasibility.
- ◆ Providing the technical analysis necessary for project participants to resolve policy issues.

Public facility financing continues to change dramatically due to state constitutional amendments and the public's reluctance to pay for growth. In response, we have been at the forefront in developing new approaches, such as smart growth strategies, area-wide fee programs and special use fees for affordable housing. Our staff remains up-to-date on the latest legislative actions and court decisions affecting this rapidly changing field, and is sought out by attorneys for expert witness services.

REFERENCES

MUNIFINANCIAL IMPACT FEE REFERENCES
Dixon Unified School District Library District Gregg Atkins, District Librarian Tel: (707) 678-1805
City of Gilroy Richard Smelser, City Engineer Tel: (408) 846-0260
County of Kings Mary Gallegos, Deputy County Administrative Officer Tel: (559) 582-3211

PROJECT TEAM

We have selected senior professionals for the Placentia Library District's project. We are confident that the MuniFinancial team has a depth of experience that will successfully fulfill the District's desired work performance.

Mr. **Marshall Eyerman**, Principal Consultant in our Financial Consulting Services Group, will serve as principal-in-charge and project manager. Mr. Eyerman will provide for timely completion of the project and adequate staff resourcing. He will also provide expert advice and oversee the quality of work of deliverables. Mr. Eyerman will be the District's day-to-day contact for this engagement and will be present at meetings related to the project.

Mr. **Robert Spencer**, Principal Consultant, and Ms. **Sally Van Etten**, Senior Project Analyst, will provide technical oversight to the project. Mr. Spencer has more than 18 years of infrastructure financing and impact fee experience consulting to local agencies throughout California.

Lastly, Ms. **Toyasha Black** and Ms. **Quennelle Quartararo** will provide analytical support.

10 Years Experience

Areas of Expertise

Cost of Service Analysis

Special District

Formation

Impact Fee Studies

Fiscal Analysis

Arbitrage Rebate

Municipal Disclosure

Education

*Master's and Bachelor's,
Business Administration,
California State
University, San Marcos*

MARSHALL EYERMAN

PRINCIPAL CONSULTANT

Having been associated with MuniFinancial since May of 1997, *Marshall Eyerman* is currently a Principal Consultant in the Financial Consulting Services Group at MuniFinancial. A professional with ten years of experience in all facets of municipal finance, Mr. Eyerman is one of MuniFinancial's most diversely knowledgeable team members. He has significant experience in preparing cost of service analyses, fiscal impact analyses and development impact fee studies. Mr. Eyerman is also deeply experienced in special district formations, and is one of our lead consultants for community facilities district formation projects.

Dedicated to his craft, Mr. Eyerman is involved in various organizations, such as the California Society of Municipal Finance Officers, National Association of Bond Lawyers and National Federation of Municipal Analysts and routinely offers educational sessions detailing aspects of the analysis process to clients and internal staff.

Mr. Eyerman came to MuniFinancial with experience performing financial analysis and providing investment advice as a Licensed Registered Representative. His very first duties at the firm were focused on local improvement districts within the District Administration Services group. He then worked within the Federal Compliance Group, focusing on the development of continuing disclosure practices, before moving to the Financial Consulting Services Group.

RELATED EXPERIENCE

Mr. Eyerman's past clients include:

- ♦ *City of Calexico, CA*
- ♦ *City of Chowchilla, CA*
- ♦ *City of El Centro, CA*
- ♦ *County of Fresno, CA*
- ♦ *City of Fresno, CA*
- ♦ *City of Hemet, CA*
- ♦ *City of Indio, CA*
- ♦ *City of Los Angeles, CA*
- ♦ *City of Palm Springs, CA*
- ♦ *City of Rio Vista, CA*
- ♦ *Tracy Operating Partnership Joint Powers Authority, CA*
- ♦ *Stockton Public Financing Authority, CA*

12 Years Experience

Areas of Expertise

*Development Impact Fees
and Fiscal Analyses*

Project Highlights

City of Roseville

Education

*Master of Community and
Regional Planning,
University of New Mexico*

*Bachelor of Arts, Political
Science, Stanford
University*

SALLY VAN ETTEN

SENIOR PROJECT ANALYST

Sally Van Etten is a Senior Project Analyst in MuniFinancial's Oakland office with more than 10 years of experience as a senior economist and project manager. Her background includes conducting demographic and economic analyses and preparing development impact fee documentation for cities, counties and special districts. She is also experienced in conducting fiscal analyses of county budget and development projects, often in conjunction with environmental impact documentation. Additionally, she has prepared and led citizen participation group meetings and presented reports and findings in numerous public forums including city councils, county boards of supervisors, and school boards of directors.

RELATED EXPERIENCE

Development Impact Fees

- ♦ **Public Facilities Impact Fee; City of Roseville, CA:** Senior analyst preparing update and substantial methodological revision of the City's public facilities public facilities fee program. Includes analysis of existing fire facilities tax and determination of whether City's facilities needs would better be served by changing to an impact fee method for funding fire facilities in addition to other public facilities already included in the fee program.
- ♦ **Public Facilities Impact Fee; City of Rocklin, CA:** Prepared impact fee documentation for the City's public facilities impact fee program.
- ♦ **Fire Facilities Impact Fee Analysis; Stanislaus County Fire Protection Districts:** Senior analyst on analyses to determine if the documentation for each of four independent fire districts (Salida, West Stanislaus, Oakdale Rural, and Stanislaus Consolidated) needs to be updated; recalculation of fire facilities impact fees and updating of documentation for those districts where it is indicated.

Fiscal Impact Analysis

- ♦ **Fiscal Impact Analysis; City of Palm Springs, CA:** Analyst for fiscal impact analysis of general fund costs and revenues to determine appropriate funding level for a proposed community facilities district.
- ♦ **Fiscal Impact Analysis; County of Placer, CA:** Analyst updating a countywide fiscal impact analysis.
- ♦ **Fiscal Impact Analysis; City of Roseville, CA:** Conducted several fiscal analyses for pertaining to development projects. Prepared analysis comparing and contrasting the fiscal ramifications of existing and proposed zoning.

18 Years Experience

Areas of Expertise

*Infrastructure
Financing,
Public Services
Funding,
And Economic Policies*

Project Highlights

*City of Redding and
City of Roseville*

Education

*Master of Public Policy,
Kennedy School of
Government, Harvard
University, with a
concentration in Urban
Economic Development*

*Bachelor of Arts in
Economics,
Colorado College*

**Professional
Affiliations**

*Urban Land Institute
American Planning
Association
California Municipal
Finance Officers
Association*

ROBERT D. SPENCER

PRINCIPAL CONSULTANT

Robert Spencer is a Principal Consultant in the Financial Consulting Services Group at MuniFinancial. He is an economist with extensive experience assisting public agencies with the development of sound financial and economic policies. Much of his work is related to infrastructure financing and public services funding to serve a community's growth or revitalization. Based on this expertise, Mr. Spencer has assisted agencies with land use policy, growth management, economic development, and business regulation.

RELATED EXPERIENCE

Development Impact Fees

Mr. Spencer is one of California's leading experts on development impact fee programs. He has broad experience reviewing and structuring impact fee programs for cities, counties, special districts, and school districts. For these clients he has provided nexus documentation to support fees funding a full range of public facilities, including utilities (water, wastewater and storm drainage), roadways and transit, parks, fire, police, and administrative offices. He has also developed innovative analyses for fees that fund habitat conservation and affordable housing. His expertise has led clients to engage him as an expert witness in defending their fee programs. Most of the impact fee studies that Mr. Spencer has managed have included participation by developers and presentations to elected officials.

Mr. Spencer has also assisted clients with some of the most challenging impact fee programs—implementation of a single fee across multiple jurisdictions to fund regional facilities. Mr. Spencer has managed multi-jurisdictional fee studies for the Counties of El Dorado, Fresno, Los Angeles, San Luis Obispo, Solano, and for the Alameda and Santa Clara County Congestion Management Agencies. The largest of these studies (Los Angeles) required Mr. Spencer to develop a strategy for and manage the participation of all 88 cities and the County of Los Angeles through the client, the Los Angeles Metropolitan Transportation Authority.

Clients have also engaged Mr. Spencer to examine critical policy issues often raised by impact fee programs. A common concern is the effect of fees on economic development objectives. In this regard, Mr. Spencer has performed market studies that evaluated the effect of impact fees on specific development projects, and on the overall ability of a city to attract new development. He has conducted detailed fee surveys to provide clients with a comparison of impact fee programs and public facility funding methods used by their competitors for economic development. Clients have included the cities of Fremont and Roseville, and the County of Placer.

Teaching and Speaking Experience

"Planning In Financially Difficult Times: Creative Approaches to Funding and Managing Resources", California Planning Foundation workshop, June 11, 2004.

"Takings and Exactions: Imposing Conditions on Development Without Going Too Far", University of California at Davis Extension, 2002, 2003, and 2004.

National Impact Fee Roundtable, moderator and speaker (various topics), 2002, 2003, and 2004.

"Effective Local Approaches for Promoting Smart Growth: Financing and Planning Strategies", Urban Land Institute and the Association of Bay Area Governments, September 26, 2003.

Capital Facility and Infrastructure Financing

Mr. Spencer is an expert in capital facility and infrastructure financing, fiscal impact analysis, special district formation, and economic development programs. He speaks regularly on topics such as defensible impact fee programs and successful strategies for Proposition 218 mail ballot elections.

A sample of Mr. Spencer's recent experience includes:

- ♦ **Specific Plan Financing Review, County of Tehama:** Developer of a 3,700-unit project provided the County with a public facilities financing plan and fiscal impact study. Conducted a peer review of these documents, provided direction to the developer's consultant to revise assumptions and approach, and assisted with negotiations related to service delivery, tax sharing, and governance structures. Developed an approach for public service funding accepted by the developer that should result in significant positive fiscal impacts to the General Fund.
- ♦ **Wastewater Financing Plans, City of Stockton:** Principal in charge and project manager on several financing plans for wastewater infrastructure to serve developing areas. The plans included long-range developed projections, cash flow modeling, and justification of a connection fee to fund debt service on wastewater revenue bonds.
- ♦ **South Sutter County Financing Plan, Sutter County:** Managed project to develop a \$300 million financing plan for 3,500 acres planned for commercial and industrial development. Included absorption and financial feasibility analyses.
- ♦ **Development Impact Fee Program, City of Redding:** Managed project to develop comprehensive impact fee program for the City of Redding that includes storm drain, water, sewer, parks, fire, and transportation facilities. Special attention was paid to the development of a financing plan for the storm drain and other utilities because of the lack of updated plans and the need for immediate funding.

Fiscal Impact Analysis

Mr. Spencer has managed over 40 fiscal impact studies for a broad range of public agency clients. He focuses on helping clients understand the economic implications of land use policy decisions. Mr. Spencer has also managed the development of proprietary fiscal impact analysis software to provide clients with a user-friendly program designed to help them conduct their own fiscal impact studies. Much of Mr. Spencer's fiscal impact analysis work has been as an "honest broker," providing objective analysis to both sides (city and county) in property tax sharing negotiations for annexations and incorporations.

5 Years Experience

TOYASHA BLACK

Areas of Expertise

SENIOR ANALYST

User Rates Analysis

Cost Allocation Plans

Utility Rate Studies

Toyasha Black is a Senior Analyst within the Financial Consulting Services Group at MuniFinancial. Her responsibilities include supporting project managers and conducting fiscal analyses on user rates, cost allocation plans, and utility rate studies. Client interaction also falls under her purview.

Education

Master of Public Administration, Concentration in Public Finance, California State University Fullerton, Fullerton, CA

Bachelor of Arts, Criminal Justice, Concentration in Pre-Law, California State University Fullerton, Fullerton, CA

Prior to her employment with MuniFinancial, Ms. Black worked as a Management Analyst for the City of Arcadia's Public Works Services Department. Her duties included extensive review of the department's user fee information, maintenance tracking and budgeting system, establishing utility billing rates (water, sewer, and refuse), and overseeing environmental programs. She is a new member of MuniFinancial's staff, joining the firm in 2006.

RELATED EXPERIENCE

- ♦ *City of Arcadia, CA* – Water and Sewer Rate Study
- ♦ *City of Huntington Park, CA* – Cost Allocation Plan
- ♦ *City of Madera, CA* – Development Services Fee Study
- ♦ *City of Orange, CA* – Cost Allocation Plan
- ♦ *City of Richmond, CA* – Cost Allocation Plan and User Fee Study
- ♦ *City of Rocklin, CA* – Building Fee Study
- ♦ *City of Shasta Lake, CA* – Building and Planning User Fee Study

Areas of Expertise

*Fiscal Analysis For
User Rates and Fees*

Education

*Master of Business
Administration, Finance
Concentration, California
State University, San
Bernardino, CA*

*Bachelor of Science,
Chemistry, University of
Redlands, Redlands, CA
magna cum laude*

*AWWA Financial
Management Seminar,
2005*

Phi Beta Kappa

QUENNELLE QUARTARARO

ANALYST II

Quennelle Quartararo is an analyst within the Financial Consulting Services Group at MuniFinancial. Her responsibilities include supporting project managers and conducting fiscal analyses on rates and fee studies. Client interaction also falls under her purview.

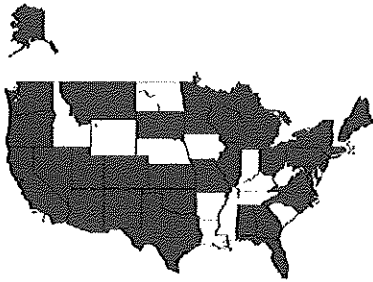
Prior to her employment with MuniFinancial, Ms. Quartararo served as a Graduate Assistant at California State University, San Bernardino. There, she was responsible for the Strategic Management Laboratory, where she supervised and advised students as they constructed business plans (integrating knowledge learned from their accounting, finance, information and decision sciences, management, and marketing courses).

Ms. Quartararo's experience also includes employment as a mathematics tutor in the San Bernardino School District; and an internship with the Arrowhead Financial Group, where she prepared reports in response to customer inquiries and assisted in account maintenance.

RELATED EXPERIENCE

- ♦ *Water Rate Studies* – Supporting analyst for:
 - ♦ *Walnut Valley Water District (Walnut, CA)*
 - ♦ *City of Livingston, CA*
 - ♦ *Port Hueneme, CA*
 - ♦ *City of Corcoran, CA*
- ♦ *Water and Sewer Rate Studies* – Supporting analyst for:
 - ♦ *City of Calexico, CA*
 - ♦ *City of Merced, CA*
 - ♦ *City of Rio Vista, CA*
- ♦ *User Fee Studies*. Supporting analyst in user fee studies for:
 - ♦ *City of Artesia, CA* – Comprehensive Fee Study
 - ♦ *City of San Carlos, CA* – Comprehensive Fee Study
- ♦ *Financial Analyses*. Supporting analyst in studies for:
 - ♦ *City of Beverly Hills, CA* – Joint Powers Agreement Study

FIRM BACKGROUND



MuniFinancial, Willdan, Arroyo Geotechnical and American Homeland Solutions are the four-company public service team that has grown from the 1964 establishment of Willdan Engineering, known today as *WILLDAN Group, Inc.* This group of companies provides financial and economic consulting, civil and structural engineering, planning, geology and geotechnical engineering, and security consulting services for public sector clients throughout California and across the nation.



MuniFinancial provides financial and economic consulting for growth planning, revenue generation, debt administration and municipal services, with specialties such as ongoing municipal disclosure and arbitrage rebate compliance. Established in 1988, MuniFinancial has worked with more than 600 public agencies throughout the United States.



Willdan is a full-service, multi-disciplinary California corporation that specializes in consulting, engineering and planning services for governmental agencies. Willdan has expanded in size, locations, and service capabilities; thus becoming an industry leader in public works design, planning, and financing. Its staff of over 441 professional and technical experts includes specialists in highways and roadways, drainage and flood control, bridges, traffic and transportation, municipal landscape architecture, environmental planning; construction management, building and safety services, urban and regional planning; water resources, structural engineering, computer-aided analysis and design; and other technical fields.



Arroyo Geotechnical offers a full complement of geology/geotechnical engineering capabilities, including soils engineering, earthquake and seismic hazard studies, geology and hydrogeology engineering. Arroyo Geotechnical also maintains a full-service geotechnical laboratory.



American Homeland Solutions (AHS) is a recently formed subsidiary of Willdan Group, Inc. AHS is dedicated to helping clients enhance their preparedness and responsiveness to domestic security. AHS intends to partner with clients to assist them with obtaining available funding and finding innovative security solutions. Some of the areas of opportunity include homeland security needs assessments, school security planning, grant writing, public education outreach, and emergency response training.

INTRODUCTION TO MUNIFINANCIAL

MuniFinancial is a wholly owned subsidiary of Willdan Group, Inc. and was established on June 15, 1988. MuniFinancial has the largest special district formation and administration practice in the nation. We are also known as the pre-eminent municipal disclosure firm, and a major provider of arbitrage rebate services. Our clients include cities, counties, state agencies, port authorities, housing agencies, special districts and school districts in 34 states. Our *staff of over 80 professionals* acts as an extension of Agency staff, providing such services as:

- ♦ Financial studies to identify funding sources or to determine optimal utility rates, standby charges and cost of services;
- ♦ Municipal disclosure reports preparation and dissemination;
- ♦ Arbitrage rebate calculations;
- ♦ Economic studies, such as fiscal analyses of new development, annexation and incorporation studies and developer impact fees;

MuniFinancial provides the following primary services:

- ✓ *Federal Compliance Services*
- ✓ *District Administration Services*
- ✓ *Financial Consulting Services*

- ♦ Administration of special taxes, assessments, standby charges and utility rates; and
- ♦ District formation services for capital project assessment/local improvement districts, community facilities districts, landscaping and lighting districts, and special taxes.

MuniFinancial's success is based on a corporate philosophy of personal service. We provide support throughout the year — and for years after. Clients can be assured that we can be reached should any questions or issues arise.

We serve as an extension of our clients' staff, augmenting existing personnel by providing specialized expertise. In support of this, MuniFinancial staff members regularly write articles and conduct presentations for local, state and national organizations. We hold client workshops, and conduct onsite training throughout the year to assist clients in keeping abreast of the latest developments, while helping new Agency staff understand our services.

MuniFinancial focuses on the following client base:

- ✓ State Agencies
- ✓ Counties
- ✓ Cities
- ✓ School Districts
- ✓ Special Districts
 - ♦ Community Services Districts
 - ♦ Recreation and Park Districts
 - ♦ Water Districts
 - ♦ Vector Control Districts

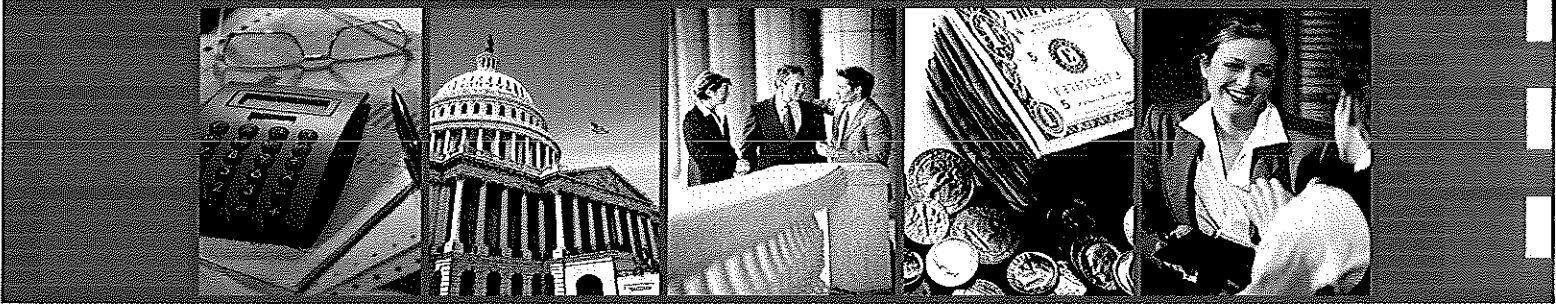
FINANCIAL CONSULTING SERVICES GROUP

MuniFinancial has been built on deep, continuing relationships with local government department staff. With hundreds of ongoing client relationships in finance, engineering and other services, we have been consistently called upon to assist staff with a range of special projects. In response to this need, the Financial Consulting Services Group was created with experienced staff in offices in both northern and southern California.

Our work incorporates excellent **public communication strategies and skills**. As voter approval becomes the norm for revenue measures, we offer expertise in communicating persuasive information to the targeted group, whether developers, land owners or the general electorate. We provide clearly written report summaries, on-point public presentations and strong meeting facilitation skills.

The table below provides an overview of Financial Consulting Services Group services.

DEVELOPMENT INFRASTRUCTURE FINANCING	
Developer Impact & Utility Connection Fees for Capital Facilities	Infrastructure & Public Facilities Financing Plans
Real Estate Market Analysis & Development Forecasts	Capital Improvement Plans
SPECIAL DISTRICT FORMATION ASSISTANCE	
Community Facilities Districts, including Special Tax Analysis	Proposition 218 Benefit Analysis
Landscaping and Lighting Act of 1972	Fire Suppression Districts
Benefit Assessment Act of 1982	Bridge & Thoroughfare Districts
1913/1915 Act Bonded Assessment Districts	Refunding Bond Analysis & Reporting
Construction Acquisition Services	Notice & Ballot Preparation & Mailing
FEE AND RATE STUDIES	
User Fee Analysis	Utility Rate Modeling
Cost Allocation Studies	Budget Planning
ECONOMIC AND FISCAL POLICY ANALYSIS	
LAFCO Annexation, Consolidation, or New Governmental Agency Formation Studies	Financial Modeling, Budget Analysis, & Feasibility Studies
Fiscal Impact Analysis of projects, plans, & Policies	Economic Development & Economic Impact Studies



27368 Via Industria, Suite 110, Temecula, California 92590

Placentia Library District

Development Impact Fees

September 18, 2006

MISSION STATEMENT

THE DOLINKA GROUP
PROVIDES
STRATEGIC FINANCIAL AND DEMOGRAPHIC SERVICES
TO MEET ITS CLIENTS' NEEDS.

OUR HALLMARK
IS ESTABLISHING LONG-TERM RELATIONSHIPS,
PROVIDING LEADING-EDGE SOLUTIONS,
AND MAINTAINING A BROAD SCOPE OF SERVICES.

OUR CLIENTS CAN THEN FOCUS ON THEIR CORE MISSION
UTILIZING THE EXPERTISE THE DOLINKA GROUP PROVIDES.

Experience of Dolinka Group

- Preparation of Development Impact Fee Studies since 1986
- Assist more than 75 School Districts Prepare Development Impact Fee Studies
- David Taussig & Associates Prepares Development Impact Fee Studies for Cities, Counties and Other Public Agencies Throughout State
- Currently Preparing Development Impact Fee Study for Banning Public Library District

Sample of School District Developer Fee Clients

- Alvorad Unified School District
- Banning Unified School District
- Capistrano Unified School District
- Carlsbad Unified School District
- Corona-Norco Unified School District
- Del Mar Union School District
- El Segundo Unified School District
- Escondido Union School District
- Escondido Union High School District
- Huntington Beach City School District
- Irvine Unified School District
- Jurupa Unified School District
- Lake Elsinore Unified School District
- Los Angeles Unified School District
- Menifee Union School District
- Murrieta Valley Unified School District
- Orange Unified School District
- Placentia-Yorba Linda Unified School District
- Poway Unified School District
- San Bernardino City Unified School District
- Torrance Unified School District
- Vista Unified School District

Familiarity with Community

- Demographic and Financial Consultant to Placentia-Yorba Linda Unified School District
 - » Authored Development Impact Fee Studies
 - » Assist with Development Tracking
 - » Preparation of Enrollment Projections
 - » Adjustment of School Attendance Boundaries
 - » Negotiation of School Facilities Mitigation Agreements with Developers
 - » Formation and Administration of Mello-Roos Community Facilities District

Development Impact Fee Process

- Gather Baseline Data Needed for Development Impact Fee Study
- Library District Identifies Future Needs through Facilities Master Plan or Capital Improvement Program
- Development Impact Fee Study Prepared with Needs Identified in Master Plan
- Library District Circulates Development Impact Fee Study for Public Review
- Library District Holds Public Hearing and Adopts Calculated Fees
- Library District Establishes Method for Collecting Fees

Establishing Relationships

Dolinka Group Interested in:

- Establishing Long-Term Partnerships with Communities
- Assisting with the Library District's Future Planning Process
- Offering a Variety of Services to Meet Future Needs