

**AGREEMENT FOR PROFESSIONAL ASSESSMENT ENGINEERING  
AND SPECIAL TAX CONSULTING SERVICES  
[Francisco & Associates, Inc.]**

THIS AGREEMENT is made and entered into as of the 25<sup>th</sup> day of March, 2025 by and between the City of Brentwood, a municipal corporation of the State of California ("City"), and Francisco & Associates, Inc., a California Corporation ("Consultant") (each a "Party" and collectively, the "Parties").

**RECITALS**

A. City requires the professional services of a consultant specifically trained and experienced in professional Assessment Engineer and Special Tax Consulting Services, which includes: 1) Assessment Engineering Services in connection with the annual administration services for the Landscaping & Lighting Assessment Districts (LLADs), Citywide Park Maintenance District No. 98-1, Water Sewer Standby Charges and Roadway Landscape (R Area) Assessment Districts and 2) any other assessment and tax services required by the City, which are professional services outside of services offered by City.

B. Consultant has the professional skills and experience necessary to perform the services described in this Agreement.

C. Consultant customarily engages in these services as part of its independently established trade, occupation, and/or business, separately from its work for City.

D. City desires to engage Consultant to provide these services by reason of its qualifications and experience in performing such services

E. Consultant has submitted a proposal to City and has affirmed its willingness and ability to perform such work on the terms and manner set forth in this Agreement.

NOW, THEREFORE, in consideration of these recitals and the mutual covenants contained herein, the Parties agree as follows:

1. Scope of Work.

1.1 City retains Consultant, as an independent contractor, to perform, and Consultant agrees to render, those services (the "Services") that are described in the attached Exhibit "A," which is incorporated by this reference, pursuant to this Agreement's terms and conditions.

1.2 Consultant will control the manner and the means of the work to be performed, and be responsible for the professional quality, technical accuracy and coordination of the Services. Consultant will, without additional compensation, correct or revise any errors or deficiencies in the Services.

1.3. Consultant will keep City informed on a regular basis that the Services are being performed in accordance with the requirement and intentions of this Agreement.

1.4 If applicable, Consultant has designated those persons listed in Exhibit "A" to provide the Services to the City. Consultant will not change or reassign those persons described in Exhibit "A" without prior written notice to City, and will not replace those individuals with individuals to whom City has a reasonable objection.

2. Standard of Performance. Consultant acknowledges that in entering into this Agreement the City is relying on Consultant's special skills and experience to do and perform the Services. While performing the Services, Consultant will exercise the reasonable professional care and skill customarily exercised by reputable members of Consultant's profession practicing in the Northern California area. The acceptance of the Services by City does not release Consultant from these obligations.

Consultant will be responsible for employing or engaging all persons necessary to perform the Services. Consultant will control the manner and means of the services to be performed by its employees and subconsultants. All of Consultant's staff will be qualified by training and experience to perform their assigned tasks. Consultant will give its personal attention to the fulfillment of the provisions of this Agreement by all of its employees and subcontractors, if any, and will keep the Services under its control. On demand of City, if any employee or subcontractor of Consultant fails or refuses to carry out the provisions of this Agreement or appears to be incompetent or to act in a disorderly or improper manner, he or she will be discharged immediately from the Services.

3. Term. Unless earlier terminated, the term of this Agreement will be effective from April 1, 2025 through June 30, 2027. The City Manager may amend the Agreement to extend it for two additional one-year periods, or parts thereof, in an amount not to exceed two hundred thirty-eight thousand nine hundred fifty dollars (\$238,950) per Agreement year. Extensions will be based upon a satisfactory review of Consultant's performance, City needs, and appropriation of funds by the City Council. The parties will prepare a written amendment indicating the effective date and length of the extended Agreement.

4. Schedule. Consultant will generally adhere to the schedule set forth in Exhibit "A" provided, that City will grant reasonable extensions of time for the performance of the Services occasioned by unusually lengthy governmental reviews of Consultant's work product or other unavoidable delays occasioned by unforeseen circumstances; provided, further, that such unavoidable delay will not include strikes, lockouts, work stoppages, or other labor disturbances conducted by, or on behalf of, Consultant's officers or employees.

Consultant acknowledges the importance to City of City's project schedule and agrees to put forth its best professional efforts to perform the Services in a manner consistent with that schedule. City understands, however, that Consultant's performance must be governed by sound practices. Consultant will work such overtime or engage such personnel and equipment as necessary to maintain the schedule, without additional compensation.

5. Compensation.

5.1 The total fee payable for the Services to be performed during the term of this Agreement will be a not to exceed amount of two hundred thirty-eight thousand nine hundred fifty dollars (\$238,950) for the administration of the 2025/26 assessment year activities and two hundred thirty-eight thousand nine hundred fifty dollars (\$238,950) for the administration of the 2026/27 assessment year activities as may be further specified in the attached Exhibit "A." No other compensation for the Services will be allowed except for items covered by subsequent amendments to this Agreement. The City reserves the right to withhold a ten percent (10%) retention until City has accepted the Services.

5.2 Payment will occur only after receipt by City of invoices sufficiently detailed to include hours performed, hourly rates, and related activities and costs for approval by City.

5.3 Within thirty (30) days after receipt of any applicable progress payment request, City will verify the accuracy of the request, correct the charges where appropriate, and make payment to Consultant in an amount equal to the amount of such application, as verified or corrected by City. No payment made prior to completion and acceptance of the Services will constitute acceptance of any part of the Services. City reserves the right to withhold payment from Consultant on account of Services not performed satisfactorily, delays in Consultant's performance of Services, or other defaults hereunder.

6. Status of Consultant. Consultant will perform the Services as an independent contractor, free from the control and direction of City, in pursuit of Consultant's independent calling, and not as an employee of City. The persons used by Consultant to provide the Services under this Agreement will not be considered employees of City for any purposes whatsoever and City will not pay any tax, workers' compensation insurance, retirement contributions or unemployment contributions on behalf of Consultant or its employees or subcontractors. Consultant agrees to indemnify and pay City within thirty (30) days for any tax, retirement contribution, social security, overtime payment, unemployment payment or workers' compensation

payment, including, but not limited to, those based on any provision of the Federal Affordable Care Act, which City may be required to make on behalf of Consultant or any agent, employee, or contractor of Consultant for work done under this Agreement. The payment made to Consultant pursuant to the Agreement will be the full and complete compensation to which Consultant is entitled. City will not make any federal or state tax withholdings on behalf of Consultant or its agents, employees or subcontractors. At the City's election, City may deduct the amounts paid pursuant to this Section, from any balance owing to Consultant.

7. Subcontracting. Consultant's services are being requested by City because they are unique and personal. Except as may be specified in Exhibit "A", Consultant will not subcontract any portion of the Services without prior written approval of City Manager or his/her designee. If Consultant subcontracts any of the Services, Consultant will be fully responsible to City for the acts, errors and omissions of Consultant's subcontractor and of the persons either directly or indirectly employed by the subcontractor, as Consultant is for the acts and omissions of persons directly employed by Consultant. Nothing contained in this Agreement will create any contractual relationship between any subcontractor of Consultant and City. Consultant will be responsible for payment of subcontractors. Consultant will bind every subcontractor and every subcontractor of a subcontractor by the terms of this Agreement applicable to Consultant's work unless specifically noted to the contrary in the subcontract and approved in writing by City.

8. Other Consultants. The City reserves the right to employ other consultants in connection with the Services.

9. Indemnification. Consultant will hold harmless, defend and indemnify City, its officers, agents, volunteers and employees from and against any and all claims, demands, costs or liability including attorney fees arising out of or in any way connected with the performance of this Agreement, caused in whole or in part by any act or omission of the Consultant, any of its subcontractors, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, except to the extent caused by the active negligence, sole negligence, or willful misconduct of City.

10. Insurance. Consultant will obtain and maintain, at its cost and expense, for the duration of the Agreement and any and all amendments, insurance against claims for injuries to persons or damage to property which may arise out of or in connection with performance of the Services by Consultant or Consultant's agents, representatives, employees or subcontractors. The insurance will be obtained from an insurance carrier admitted and authorized to do business in the State of California. The insurance carrier is required to have a current Best's Key Rating of not less than "A:VII."

10.1 Coverages and Limits. Consultant will maintain the types of coverages and minimum limits indicated below, unless Risk Manager or City Manager, in consultation with the City Attorney approves a lower amount. These minimum amounts of coverage will not constitute any limitations or cap on Consultant's indemnification obligations under this Agreement. City, its officers, agents, volunteers and employees make no representation that the limits of the insurance specified to be carried by Consultant pursuant to this Agreement are adequate to protect Consultant. The coverage will contain no special limitations on the scope of its protection to the above-designated insureds except for Workers Compensation and errors and omissions insurance. Consultant will obtain occurrence coverage, excluding Professional Liability, which will be written as claims-made coverage. If Consultant believes that any required insurance coverage is inadequate, Consultant will obtain such additional insurance coverage, as Consultant deems adequate, at Consultant's sole expense.

10.1.1 Commercial General Liability Insurance. \$2,000,000 combined single-limit per occurrence for bodily injury, personal injury and property damage. If the submitted policies contain aggregate limits, general aggregate limits will apply separately to the work under this Agreement or the general aggregate will be twice the required per occurrence limit.

10.1.2 Automobile Liability. \$1,000,000 combined single-limit per accident for bodily injury and property damage.

10.1.3 Workers' Compensation and Employer's Liability. Workers' Compensation limits as required by the California Labor Code and Employer's Liability limits of \$1,000,000 per accident for bodily injury. Workers' Compensation and Employer's Liability insurance will not be required if Consultant has no employees and provides, to City's satisfaction, a declaration stating this.

10.1.4 Professional Liability. Errors and omissions liability appropriate to Consultant's profession with limits of not less than \$1,000,000 per claim.

10.2 Endorsements. For Commercial General Liability Insurance, Consultant will ensure that the policies are endorsed to name the City, its officers, agents, volunteers and employees as additional insureds. Prior to City's execution of this Agreement, Consultant will furnish, to the satisfaction of the City, certificates of insurance and endorsements.

10.3 Cancellation. Insurance will be in force during the life of the Agreement and any extensions of it and will not be canceled without thirty (30) days prior written notice to City sent pursuant to the notice provisions of this Agreement.

10.4 Failure to Maintain Coverage. If Consultant fails to maintain any of these insurance coverages, then City will have the option to declare Consultant in breach of this Agreement, or may purchase replacement insurance or pay the premiums that are due on existing policies in order to maintain the required coverages. Consultant is responsible for any payments made by City to obtain or maintain insurance and City may collect these payments from Consultant or deduct the amount paid from any sums due Consultant under this Agreement.

10.5 Submission of Insurance Policies. City reserves the right to require, at any time, complete and certified copies of any or all required insurance policies and endorsements.

10.6 Primary Coverage. For any claims related to the Services and this Agreement, the Consultant's insurance coverage will be primary insurance with respect to City, its officers, agents, volunteers and employees. Any insurance or self-insurance maintained by City for itself, its officers, agents, volunteers and employees, will be in excess of Consultant's insurance and not contributory with it.

10.7 Reduction in Coverage/Material Changes. Consultant will notify City in writing pursuant to the notice provisions of this Agreement thirty (30) days prior to any reduction in any of the insurance coverage required pursuant to this Agreement or any material changes to the respective insurance policies.

10.8 Waiver of Subrogation. The policies shall contain a waiver of subrogation for the benefit of City.

11. Business License. If required, Consultant will obtain and maintain a City of Brentwood Business License for the term of the Agreement, as it may be amended from time-to-time.

12. Maintenance of Records. Consultant will maintain complete and accurate records with respect to costs incurred under this Agreement. All records will be clearly identifiable. Consultant will allow a representative of City during normal business hours to examine, audit, and make transcripts or copies of records and any other documents created pursuant to this Agreement. Consultant will allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

13. Ownership of Documents.

13.1 All product produced by Consultant or its agents, employees, and subcontractors pursuant to this Agreement (the "Work Product") is the property of City. In the event this Agreement is terminated, all Work Product produced by Consultant or its agents, employees and subcontractors pursuant to this Agreement will be delivered to City pursuant to the termination clause of this Agreement. Consultant will have the right to make one (1) copy of the Work Product for Consultant's records.

13.2 The Work Product may be used by City and its agents, employees, representatives, and assigns, in whole or in part, or in modified form, for all purposes City may deem advisable, without further employment of or payment of any compensation to Consultant; provided, however, that if this Agreement is terminated for any reason prior to completion of the Project and if under such circumstances City uses, or engages the services of and directs another consultant to use, the Work Product, City agrees to hold Consultant harmless from any and all liability, costs, and expenses relative to claims arising out of matters and/or events which occur subsequent to the termination of this Agreement as a result of causes other than the fault or negligence of Consultant, or anyone for whose acts it is responsible, in preparation of the Work Product. Consultant will not be responsible for deficiencies solely attributable to modifications of the Work Product performed by others, or that arise from use of the Documents in connection with a project or site other than that shown in the Work Product.

14. Copyrights. Consultant agrees that all copyrights that arise from the Services will be vested in City and Consultant relinquishes all claims to the copyrights in favor of City.

15. Confidentiality. All documents, reports, information, data, and exhibits prepared or assembled by Consultant in connection with the performance of the Services pursuant to the Agreement are confidential until released by the City to the public, and the Consultant will not make any of these documents or information available to any individual or organization not employed by the Consultant or the City without the written consent of the City before any such release.

16. Notices. Any notices relating to this Agreement shall be given in writing and shall be deemed sufficiently given and served for all purposes when delivered personally, by facsimile or by generally recognized overnight courier service, or five (5) days after deposit in the United States mail, certified or registered, return receipt requested, with postage prepaid, addressed as follows:

<u>For City:</u> City of Brentwood 150 City Park Way Brentwood, CA 94513 Phone No. (925) 516-5111 Facsimile No. (925) 516-5447 Attn: Aaron Wanden, Park Maint. Mgr.	<u>For Consultant:</u> Francisco & Associates, Inc. 231 Market Place, Suite 543 San Ramon, CA 94583 Phone No. (925) 867-3400 Facsimile No. (925) 867-3415 Attn: Eduardo Espinoza, Managing Principal
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Either Party may change its address for purposes of this section by giving the other Party written notice of the new address in the manner set forth above.

17. Conflicts of Interest.

17.1 City will evaluate Consultant's duties pursuant to this Agreement to determine whether disclosure under the Political Reform Act and City's Conflict of Interest Code is required of Consultant or any of Consultant's employees, agents, or subcontractors. Should it be determined that disclosure is required, Consultant or Consultant's affected employees, agents, or subcontractors will complete and file with the City Clerk those schedules specified by City and contained in the Statement of Economic Interests Form 700.

17.2 Consultant understands that its professional responsibility is solely to City. Consultant warrants that it presently has no interest, present or contemplated, and will not acquire any direct or indirect interest, that would conflict with its performance of this Agreement. Consultant further warrants that neither Consultant, nor Consultant's agents, employees, subcontractors and consultants have any ancillary real property, business interests or income that will be affected by this Agreement or, alternatively, that Consultant will file with the City an affidavit disclosing this interest. Consultant will not knowingly, and will take reasonable steps to ensure that it does not, employ a person having such an interest in the performance of this Agreement. If after employment of a person, Consultant discovers that it has employed a person with a direct or indirect interest that would conflict with its performance of this Agreement, Consultant will promptly disclose the relationship to the City and take such action as the City may direct to remedy the conflict.

18. General Compliance with Laws. Consultant will keep fully informed of federal, state and local laws and ordinances and regulations ("Laws") which in any manner affect those employed by Consultant, or in any way affect the performance of the Services by Consultant. Consultant will at all times observe and comply with these laws, ordinances, and regulations and will be responsible for the compliance of the Services with all applicable laws, ordinances and regulations.

19. Pandemic Health Laws. Consultant's duty to comply with Laws includes compliance by Consultant with all local, state, or federal Laws that have been or may be enacted in response to the COVID-19 pandemic (collectively, "Health Laws"), which include all of the County of Contra Costa Health Orders. Failure to fully comply with the Health Laws constitutes a material default, subject to all available remedies including suspension or termination.

20. Discrimination and Harassment Prohibited. Consultant will comply with all applicable local, state and federal laws and regulations prohibiting discrimination and harassment.

21. Termination. In the event of the Consultant's failure to prosecute, deliver, or perform the Services, City may terminate this Agreement for nonperformance by notifying Consultant in writing pursuant to the notice provisions of this Agreement. Consultant has five (5) business days to deliver any documents owned by City and all work in progress to City address contained in this Agreement. City will make a determination of fact based upon the work product delivered to City and of the percentage of work that Consultant has performed which is usable and of worth to City in having the Agreement completed. Based upon that finding City will determine the final payment of the Agreement. In the event City elects to terminate, City will have the right to immediate possession of all Work Product and work in progress prepared by Consultant, whether located at the project site, at Consultant's place of business, or at the offices of a subconsultant.

Either Party, upon tendering thirty (30) calendar days written notice to the other Party, may terminate this Agreement for convenience. In this event and upon request of City, Consultant will assemble the work product without charge and put it in order for proper filing and closing and deliver it to City. Consultant will be paid for work performed to the termination date; however, the total will not exceed the lump sum fee payable under this Agreement. City will make the final determination as to the portions of tasks completed and the compensation to be made.

22. Covenants Against Contingent Fees. Consultant warrants that Consultant has not employed or retained any company or person, other than a bona fide employee working for Consultant, to solicit or secure this Agreement, and that Consultant has not paid or agreed to pay any company or person, other than a bona fide employee, any fee, commission, percentage, brokerage fee, gift, or any other consideration contingent upon, or resulting from, the award or making of this Agreement. For breach or violation of this warranty, City will have the right to terminate this Agreement for nonperformance, or, in its discretion, to deduct from the Agreement price or consideration, or otherwise recover, the full amount of the fee, commission, percentage, brokerage fees, gift, or contingent fee.

23. Claims And Lawsuits. By signing this Agreement, Consultant agrees that any Agreement claim submitted to City must be asserted as part of the Agreement process as set forth in this Agreement and not in anticipation of litigation or in conjunction with litigation. Consultant acknowledges that if a false claim is submitted to City by Consultant, it may be considered fraud and Consultant may be subject to criminal prosecution. Consultant acknowledges that California Government Code sections 12650 *et seq.*, the False Claims Act, applies to this Agreement and, provides for civil penalties where a person knowingly submits a false claim to a public entity. These provisions include false claims made with deliberate ignorance of the false information or in reckless disregard of the truth or falsity of information. If City seeks to recover penalties pursuant to the False Claims Act, it is entitled to recover its litigation costs, including attorney's fees. Consultant acknowledges that the filing of a false claim may subject Consultant to an administrative debarment proceeding as the result of which Consultant may be prevented to act as a Consultant on any public work or improvement for a period of up to five (5) years. Consultant acknowledges debarment by another jurisdiction is grounds for City to terminate this Agreement.

24. Jurisdiction, Venue and Governing Law. Any action at law or in equity brought by either of the Parties for the purpose of enforcing a right or rights provided for by this Agreement will be tried in a court of competent jurisdiction in the County of Contra Costa, State of California, and the Parties waive all provisions of law providing for a change of venue in these proceedings to any other county. This agreement will be governed by the laws of the State of California.

25. Testimony. Consultant will testify at City's request if litigation is brought against City in connection with Consultant's services under this agreement. Unless the action is brought by Consultant, or is based upon Consultant's actual or alleged negligence or other wrongdoing, City, upon prior written agreement with Consultant will compensate Consultant for time spent in preparation for testimony, testimony, and travel at Consultant's standard hourly rates at the time of actual testimony.

26. Successors and Assigns. It is mutually understood and agreed that this Agreement will be binding upon the Parties and their respective successors. Neither this Agreement nor any part of it nor any monies due or to become due under it may be assigned by Consultant without the prior written consent of City, which will not be unreasonably withheld.

27. Section Headings. Section headings as used in this Agreement are for convenience only and will not be deemed to be a part of such sections and will not be construed to change the meaning of the section.

28. Waivers. The waiver by either Party of any breach or violation of any term, covenant, or condition of this Agreement or of any applicable law will not be deemed to be a waiver of such term, covenant, condition or law or of any subsequent breach or violation of same or of any other term, covenant, condition or law. The acceptance by either Party of any fee or other payment which may become due under this Agreement will not be deemed to be a waiver of any preceding breach or violation by the other Party of any term, covenant, or condition of this Agreement or any applicable law.

29. Entire Agreement. This Agreement, together with any other written document referred to or contemplated by it embody the entire Agreement and understanding between the parties relating to the subject matter of it. The City Manager is authorized, in consultation with the City Attorney, to agree to non-material amendments to this Agreement. Neither this Agreement nor any of its provisions may be amended, modified, waived or discharged except in a writing signed by both parties.

30. Authority. The individuals executing this Agreement and the instruments referenced in it on behalf of Consultant each represent and warrant that they have the legal power, right and actual authority to bind Consultant to the terms and conditions of this Agreement.

31. Severability. If any term, provision, condition or covenant of this Agreement or its application to any party or circumstances shall be held, to any extent, invalid or unenforceable, the remainder of this Agreement, or the application of the term, provision, condition or covenant to persons or circumstances other than those as to whom or which it is held invalid or unenforceable, shall not be affected, and shall be valid and enforceable to the fullest extent permitted by law.

32. Signatures.

32.1 Counterparts. This Agreement may be executed in two or more counterparts, each of which together will be deemed an original, but all of which together will constitute the same instrument.

32.2 Digital/Electronic Signatures. Using a City-approved method, this Agreement may be executed through the use of digital or electronic signatures in accordance with Government Code Section 16.5. The presence of an electronic signature on this Agreement will be construed as the Parties' consent to do business electronically.

CONSULTANT:

By: DocuSigned by: Eduardo Espinoza  
Eduardo Espinoza, CEO/Secretary

CITY:

By: DocuSigned by: Tim Y. Ogden  
Tim Y. Ogden, City Manager

ATTEST:

By: Signed by: Amanda McVey  
Amanda McVey, City Clerk

APPROVED AS TO FORM:

By: Signed by: Shanna Edwards PK:  
Katherine Wisinski, City Attorney

If required by City, proper notarial acknowledgment of execution by Consultant must be attached. If a Corporation, Agreement must be signed by one corporate officer from each of the following two groups.

**\*Group A.**  
Chairman,  
President, **or**  
Vice-President

**\*\*Group B.**  
Secretary,  
Assistant Secretary,  
CFO **or** Assistant Treasurer

**Otherwise,** the corporation **must** attach a resolution certified by the secretary or assistant secretary under corporate seal empowering the officer(s) signing to bind the corporation.

## EXHIBIT "A"

### SCOPE OF SERVICES

#### A. Scope of Work to be Performed – Assessment Engineering

The City desires the firm to provide services described as follows:

##### Preparation of the Engineer's Reports and Levying of Assessments

- Prepare annual engineer's reports to include: description of improvements, annual budgets, benefit spread methodologies, assessment district diagrams and a listing of individual assessments for each parcel within each assessment district.
- Meet with City staff to review scope of work, project schedule and any changes to the proposed assessment districts which may affect revenues. Identify any changes in the quantity and type of improvements that the City is to maintain for the ensuing year.
- Collect available data from the County Assessor's office and from City staff that is pertinent to the annual administration of the assessment districts. The ensuing year's data would include the secured closed property tax roll for the County and proposed budgets and annexation/de-annexation information from City staff.
- Prepare the updated assessment diagrams in GIS to include parcels within the boundaries of the assessment district. This includes all parcels that have either annexed or de-annexed into the assessment districts from the prior year.
- Provide the City with a GIS database each year along with 11" x 17" copies for internal use.
- Work with City staff to prepare annual budgets, estimate which improvements are coming on-line, project which final maps will be filed to estimate number of units to assess. Data will be used to estimate the upcoming fiscal year's assessment rate and Capital Reserve collection.
- Prepare the Draft Preliminary Engineer's Reports and coordinate the preparation of the City Council staff report with the Parks and Recreation Department's staff. The draft Preliminary Engineer's reports will include a description of improvements, the ensuing year's maintenance budget, the benefit-spread methodology, Assessment District Diagrams and a listing of individual assessments for the ensuing year.
- Submit the draft Preliminary Engineer's Reports to City staff for review and comment. Based upon the comments received from City staff, prepare the final Preliminary Engineer's Reports and submit to City staff for City Council approval.
- Upon request of the City, attend the City Council meeting regarding the adoption of the Resolution of Intention and approval of the Preliminary Engineer's Reports. Based upon the comments received from City staff and City Council Members at the council meeting to approve the Preliminary Engineer's Reports, prepare the Final Engineer's Reports and subsequent City Council staff report and submit to City staff for City Council approval.
- Upon request, attend the Public Hearing regarding the approval of the Final Engineer's Reports and adoption of the Resolution Authorizing the Levy of Assessments.
- Compile all budgets and provide them in a format that is acceptable with the City's Finance department format.
- In accordance with the County's annual submittal requirements, file the Engineer's Reports, Assessment Diagrams and Resolutions Authorizing the Levy of Assessments and Water/Sewer Standby charges with the County Auditor's office.
- Prepare the annual Auditor's Reports in County approved electronic format. Any rejected parcels resulting from the first submittal will be researched and resubmitted to the County to ensure that the City receives all of the assessment revenue that is due to the City.
- Provide property owner assistance, which will involve researching property owner questions, and if necessary, provide written responses to customer questions. Coordinate any changes with the County Auditor's office.
- Once each subdivision's improvements have been accepted by City Council, audit the area to ensure all utility accounts (including water meters and street lights), areas of landscaping and maintenance are being accounted for correctly to each landscape and lighting district.
- Assist City staff on a bi-monthly basis with the tracking of the current fiscal years budgets. This

includes tracking revenues and expenditures for each of the assessment districts, and periodically analyzing the City's water and electricity usage.

- Update, prepare and deliver 11" x 17" Landscape and Lighting Assessment District Improvement Diagrams that depict each LLAD. These Improvement Diagrams will be created in a GIS format and will show each water meter and which landscaping improvements have been accepted for City maintenance. The diagrams will be updated at a minimum of once each year. The GIS files will then be provided to the City's GIS Coordinator when complete.

Landscaping & Lighting Assessment District Formation and Annexation Services

- Develop the annual assessment district budgets for any new developments within the City.
- Meet with City staff periodically to determine if any new developments within the City are anticipated and if the development will require annexation into an existing LLAD or if a new assessment district needs to be formed.
- For each new applicable development, discuss the projected timeline for developing the annual maintenance budgets, and maximum annual assessment rates.
- Conduct an inventory for each improvement type within each proposed development.
- For each commercial landscape and lighting district formed, identify which improvements are the responsibilities of the City and which improvements are the responsibilities of the individual property owner.
- Determine the maximum annual operations and maintenance budgets for each improvement type within the proposed development.
- The City operates and maintains the improvements on a fiscal year basis (July 1 through June 30) and the City does not receive its assessment revenue from the County until January and May of the same fiscal year.
- The City needs to collect approximately 6 months of operating reserves to cover the cash flow shortfall during the period (July 1 through January 1).
- The budget will include a capital replacement fund to replace capital facilities that either get vandalized or reach their life expectancy.
- The capital replacement fund should be equal to 20% of the proposed capital improvement costs.
- Determine the timeline for when the improvements will become the operation and maintenance responsibility of the City.
- Determine the number and types of development, i.e. the number of single family homes, townhomes, condominiums, apartments, and square footage of commercial, industrial, etc. within each new development.
- Develop a benefit spread methodology that fairly distributes the costs for operating and maintaining the proposed improvements to the benefiting parcels within the boundaries of the development.
- Prepare the Draft Preliminary Engineer's Reports. The Draft Preliminary Engineer's Reports will include a description of improvements, the ensuing year's maintenance budget, the benefit spread methodology, Assessment District Diagrams and a listing of individual assessments for the ensuing year.
- Submit the Draft Preliminary Engineer's Reports to City staff for review and comment. Based upon the comments received from City staff regarding the Draft Preliminary Engineer's Reports prepare the Final Preliminary Engineer's Reports and submit to City staff for City Council approval.
- Upon request attend the City Council meeting regarding the adoption of the Resolution of Intention and approval of the Preliminary Engineer's Reports.
- Based upon the comments received from City staff and City Council regarding the Preliminary Engineer's Reports prepare the Final Engineer's Reports and subsequent City Council staff report and submit to the City for City Council approval.
- Upon request, attend the Public Hearing regarding the approval of the Final Engineer's Reports and adoption of the Resolution Authorizing the Levy of Assessments.

Proposition 218 General vs. Special Benefit Analysis for Consolidated Landscape & Lighting Assessment Districts and Citywide Park Maintenance District No. 98-1

- Prepare special versus general benefit analysis.

- Meet with City staff and legal counsel to discuss the scope of work associated with the completion and implementation of the Special versus General Benefit analysis.
- Incorporate any recommended modifications received from City staff and or legal counsel.
- Based upon the approved final version of the assessment spread methodology, identify how much the City will need to contribute each fiscal year to each Landscape and Lighting Assessment Districts in order to offset each LLAD's pro-rata share of general benefit.
- With assistance from City staff, and legal counsel modify the Engineer's Report to include a discussion of the general versus special benefit analysis for each LLAD.

#### Administration of Water and Sewer Stand By Charges

- Coordinate the preparation of the City Council staff report with Engineering Department staff.
- Based upon the closed property tax roll from the County, prepare the water sewer standby databases to ensure the correct standby charges will be allocated to each taxable parcel within the City.
- Submit the standby charges to the county for inclusion on the property tax roll. If parcels are rejected, research the parcels and resubmit the corrected information to the County.
- Provide property owners assistance throughout the year which may consist of parcel research, explanation of special tax formula, etc. If requested prepare clarification letter to property owners.

#### Roadway Landscape (R Area) Administration

- Coordinate with City staff and City landscape maintenance contractors, the collection of any maps, quantities or plans that relate to the areas to be maintained.
- Work with City staff to prepare budgets and provide budgets in a format that is acceptable by the City.
- Update, prepare and deliver R Area and Weed Improvement Diagrams that depict the landscaping and weed abatement locations. These diagrams will be created in GIS format and will show each water meter and which landscaping improvements have been accepted for City maintenance.
- The Diagrams will be updated at a minimum of one time each year.
- The GIS files will then be provided to the City's GIS Coordinator when complete.

#### Development of Proposition 218 Mailing Database for Utility Rate Increases

- Merge the utility mailing address and the utility service addresses in the Utility Billing database with the mailing address and situs address in the County Assessor database and develop a complete database.
- Provide the City with a final listing of addresses that have a minimal number of duplicate addresses. This final listing will be provided in excel format.

#### B. Working Paper Retention and Access to Working Papers

All working papers and reports must be retained, at the firm's expense, for a minimum of three (3) years, unless the firm is notified in writing by the City of the need to extend the retention period. The firm will be required to make working papers available, upon request to the City.

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES  
FOR ASSESSMENT ENGINEERING SERVICES  
FOR FISCAL YEARS 2025/26 AND 2026/27**

	<u>Total Amount FY 2025/26</u>	<u>Total Amount FY 2026/27</u>
1. Landscaping & Lighting Assessment Districts	\$ 103,450	\$ 103,450
2. Citywide Park Maintenance District No. 98-1	\$ 20,750	\$ 20,750
3. Landscaping & Lighting Formations and Annexations:		

LANDSCAPE & LIGHTING ASSESSMENT DISTRICTS			
Annexation/Formation Fees			
Type of Property	No. of Parcels at Buildout	FY 2025/26 Annexation Fee	FY 2026/27 Annexation Fee
Residential	Up to 5	\$7,950	\$7,950
	6 to 100	\$7,950 + \$30/parcel > 5	\$7,950 + \$30/parcel > 5
	101 to 500	\$10,800+ \$15/parcel > 100	\$10,800+ \$15/parcel > 100
	501 or More	\$16,800+ \$5/parcel > 500	\$16,800+ \$5/parcel > 500
Commercial or Multi-Family	Less than 1 acre	\$7,950	\$7,950
	1 to 5 acres	\$8,950	\$8,950
	5 to 10 acres	\$10,950	\$10,950
	10 acres or more	\$12,950	\$12,950

Total max-price for LLADs Annexation/Formation: \$ 40,000      \$ 40,000

4. Prop. 218 General vs. Special Benefit Analysis*	Total Amount per year:	\$ <u>25,000</u>
5. Water Standby Charge	Total Amount per year:	\$ <u>2,500</u>
6. Sewer Standby Charge	Total Amount per year:	\$ <u>2,500</u>
7. LLAD's, Park Maint, R Area Administration*	Total Amount per year:	\$ <u>25,000</u>
8. Development of Prop 218 Mailing Database	Total Amount per year:	\$ <u>5,750</u>
9. Reimbursable Expenses*	Total Amount per year:	\$ <u>4,000</u>
10. Other Assessment District Services (Describe)**	Total Amount per year:	\$ <u>10,000</u>

**Total All-Inclusive Maximum Contract Price: \$ 238,950/year**

\*These services will be billed on a T&M basis as needed using the hourly rates provided.

\*\*Other Assessment District Services will be billed on a T&M basis using the hourly rates provided and is assumed to be a contingency for unforeseen work that will be provided at the request of the City.

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES  
FOR ASSESSMENT ENGINEERING SERVICES  
FOR FISCAL YEARS 2025/26 and 2026/27**

Fees for work to be performed at the request of the City will be billed on a time and materials basis. Invoicing will occur on a monthly basis at the hourly rates shown below.

**Francisco and Associates  
Hourly Rate Structure**

Classification	Hourly Rate
Principal/Project Manager	\$225.00 /hr
Quality Control Engineer	\$225.00 /hr
Senior Project Analyst	\$160.00 /hr
Project Analyst	\$145.00 /hr
Administrative Staff	\$90.00 /hr

Reimbursable expenses will be billed at cost plus 15%. Reimbursable expenses include overnight mail, duplication, mylars, County Assessor data/map fees, County Recorder fees, County Auditor fees, etc. Mileage will be billed per mile at the standard IRS billing rates.