



“Experience and expertise dedicated to maximizing revenue sources”

Fee and Rate Studies

- Cost Allocation
- User Fees
- Utility Rates—Water, Wastewater, and Stormwater
- Fiscal Impact Analysis
- Development Fee Studies

Special District Formations

- Community Facilities Districts (Mello Roos)
- School Facilities Improvement Districts
- 1913/1915 Act Assessment Districts
- 1972 Act Landscape and Lighting Districts
- 1982 Benefit Assessment Districts
- Business Improvement Districts
- Fire Suppression Assessments
- Proposition 218 Studies, Assessment Balloting, and Re-Engineering

Other Special Projects

- Facility Financing Plans
- Economic Impact Analysis
- Annexations and Incorporations
- Reassessment Engineering for Bond Refunding
- Infrastructure Evaluation and Analysis for GASB 34 Compliance
- Development Projections
- Financial Projections

Willdan’s financial consulting services group

is a team of seasoned and experienced financial professionals and economists. Their experience and expertise is dedicated to maximizing revenue and helping build a sustainable financial future for your public agency. We are comprehensive in our approach and clear and concise in our recommendations and presentations to your staff, community, and legislative body.

Our project managers understand that each agency is unique, and realize that once we join your team, we are an extension of your staff. We work hard to provide our recommendations within the context of your local issues—political, financial, and economic. Furthermore, our consultants continuously educate themselves on all the latest legal and economic factors affecting your financial future by making presentations, teaching courses, and actively participating in a broad range of industry associations.



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

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Willdan Financial Services

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

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REPRESENTATIVE PROJECTS

Cities of Reno and Sparks, Task Force on Fairness in Taxation and City-County Revenue Allocation, Reno and Sparks, Nevada—

The Cities of Reno and Sparks, Nevada convened a citizens task force to evaluate how local government revenues in the County of Washoe are used to provide the full range of City and County services. To assist the task force with a prioritization of fiscal measures to address funding shortfalls, Willdan provided a comprehensive analysis of City and County services and the revenues that fund those services.

City of Phoenix, Special Revenue Fund and Development Fee Study, Phoenix, Arizona—

One of the largest organizations of its kind in the nation, the City's Development Services Department (DSD) took steps to strategically manage its Special Revenue Fund projections and balance, and to simplify the fee schedules inherited from five departments previously assigned with its now centralized functions. Willdan was retained to complete two evaluations—a review of the DSD Special Revenue Fund balance and a review of the DSD fee schedule. As a result, Willdan identified the optimum Special Revenue Fund balance needed to sustain DSD operations in the event of an economic slowdown of up to 18 months, as well as a minimum Special Revenue Fund balance required to sustain 30-year debt service for facility acquisition or construction which may be required to house the DSD operations.

Leucadia Wastewater District, Financial Planning Services, Leucadia, California—

Willdan assisted the Leucadia Wastewater District with a long-range financial forecasting effort. Willdan reviewed and analyzed the following components: 1) District fiscal policies, 2) Capital financing objectives (CIP), 3) Operating plans and costs, and 4) Projected revenue and expenditure sources. Upon completion of the evaluation, Willdan developed an action plan and incorporated the findings into the financial plan. The final, updated plan allowed for the evaluation of long-term viability of District goals and current and future revenue sources through a documented framework.

City of Sacramento, Transportation Development Impact Fee Program, Sacramento, California—

Willdan is assisting the City with the adoption of its first citywide impact fee for roadway, pedestrian, bikeway, and transit improvements required to serve new development. The project involves nearly a dozen workshops and advisory meetings with the City Council, business and development interests, and community groups, in addition to an extensive technical effort that supports the City's new 2030 General Plan.

REPRESENTATIVE CLIENTS

City of Burlingame, CA
City of Dublin, CA
City of Elk Grove, CA
City of Fort Worth, TX
City of Indio, CA
City of Long Beach, CA
City of Palm Desert, CA
City of Phoenix, AZ
City of Roseville, CA
City of Sacramento, CA
City of Wilmington, NC
County of Fresno, CA

County of Kern, CA
County of Placer, CA
County of Riverside, CA
County of San Benito, CA
Estero Fire Rescue District, FL
Fort Ord Reuse Authority, CA
Leucadia Wastewater District, CA
Marion County, FL
San Diego Association of Governments (SANDAG), CA
San Diego County Water Authority, CA

