



Proposal for

Financial Forecast Services

City of San Leandro

In response to RFP #57069

May 16, 2018



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May 16, 2018

Ms. Julie Jenkins
Purchasing Agent
Finance Department
City of San Leandro
835 E. 14th Street
San Leandro, CA 94577

Dear Ms. Jenkins:

San Leandro City Council members identified the need to “place San Leandro on a firm foundation for long-term fiscal sustainability” as a goal for 2017-19. In the face of rising pension costs, equipment replacement, infrastructure repairs and capital improvement projects, this goal presents a challenge for many cities. A long-term financial forecast that allows staff and elected officials to see the impact of decisions on future budgets is an invaluable tool in achieving the goal of financial sustainability.

Management Partners has developed a comprehensive budget forecasting model methodology for many California cities including Benicia, Berkeley, Concord, Davis, El Monte, Fullerton, Hayward, Modesto, Morro Bay, Santa Ana and Stockton. The model is adapted to the unique aspects of each city. It contains modifiable assumptions surrounding major categories of revenues and expenditures. It also includes a payroll model component that allows for differential assumptions across and between bargaining groups and unrepresented employees. It can also be used to run different scenarios so government leaders can see the impact of new revenue measures or changes in service delivery.

Our firm is composed of local government experts who have worked with leaders for more than 20 years to help them improve the way their governments function. We are focused on results and have a bias for action. Our team is excited about the potential of this project and we look forward to discussing our approach and qualifications with you in more detail.

Sincerely,

A handwritten signature in black ink, appearing to read 'Gerald E. Newfarmer', written over a horizontal line.

Gerald E. Newfarmer
President and CEO

Table of Contents

Project Approach..... 1

 Holistic Project Management Approach..... 2

 Ensuring a High-Quality Outcome 3

 Achieving Results..... 3

Proposed Work Plan..... 4

About Management Partners 6

 Why Management Partners? 6

 Taking a Collaborative Approach..... 6

 Recognizing that Every Organization Is Unique..... 7

 From Recommendations to Implementation 7

 Services to Support Local Government Leaders..... 7

 Your Partner..... 8

Our Project Team 9

Experience and References 11

Hours and Cost..... 13

Conclusion 13

Attachment A – Project Team Resumes..... 14

Project Approach

The San Leandro City Council has identified fiscal sustainability as one of its top goals at a time when, like many California cities, it is facing challenging upcoming budgets because of pension obligations and other factors. The five voter-approved measures passed in 2014 and 2016 are providing revenue that maintains and enhances existing services, but because of pressure from pension costs, the fire service contract, equipment and infrastructure needs, and capital improvement projects, the City is projecting operating deficits as soon as FY 2019-20. The City produces a two-year budget and a five-year forecast, and the last available forecast shows expenditures from the General Fund outpacing revenues starting in 2019-20.

The City is benefitting from sales tax revenue from Measures HH (sales and use transaction tax) and BB (Alameda County streets, roads and transportation improvements) passed by voters. Voter-approved tax measures OO, PP and NN are also supporting social services, public art, library programs and services and infrastructure through increased charges on lodging, cannabis and business licenses.

A detailed long-term fiscal forecasting model will be an important resource to plan service delivery and achieve financial sustainability. Services such as public safety, infrastructure, maintenance and recreation require a long-range perspective to ensure continuity in meeting fundamental community needs and interests.

Management Partners can complete a fiscal forecasting model, designed to City specifications, that can be used to model different scenarios involving expenditure and revenue variables. We can also help develop budget strategies to strengthen the City's long-term fiscal sustainability.

We propose to produce a ten-year forecast for the City that will include all major costs and anticipated revenue. It will include costs related to employees, such as obligations from the CalPERS State Retirement System, other post-employment benefits (OPEB), salaries, and other compensation. The model will focus on the General Fund, and to the extent necessary will include special revenue funds, capital, debt and internal service funds to fully support the general fund forecast model.

The model will have an easy-to-use dashboard so assumptions can be easily changed with respect to revenue growth, pension obligations, expenditure assumptions by line item and other factors. We will coordinate closely with your staff to obtain data necessary for a solid financial forecast. Once we complete the model, it will be available for use by staff. We will provide training as well as a user's guide so City staff can update the forecast themselves as needed, but we will also be available to update the model on an annual basis or when requested.

Management Partners has extensive experience with similar work and is prepared to assist the City of San Leandro with all elements of the scope of work as identified in the RFP. We make a commitment to quality and timely performance with each client we serve. The essentials of our project approach and methodology are summarized below.

Holistic Project Management Approach

While each project has unique needs, our approach emphasizes engagement with San Leandro's staff and leaders, taking into account the distinctive circumstances and leveraging of the things that are already being done well, to craft an appropriate and customized plan for improvement. There are six distinct elements to our process:

- » *Listen.* We respect the fact that your managers, employees and stakeholders are best positioned to know what is working well and what needs improvement. Often, front-line staff have excellent ideas that they haven't been able to implement for various reasons. We use a number of tools, which can include individual interviews, focus groups, online surveys, workshops and team meetings to listen to your staff, leaders, elected officials, residents, or customers.
- » *Learn.* To best identify how to improve efficiency and effectiveness in your organization, we must first fully understand your organization, including its operating environment, the way it has worked historically and its service demands and opportunities. Using existing documents such as strategic plans, work plans, budgets, capital programs, comprehensive plans, master plans, staffing plans, codes, policies, or procedures, we drill down to the level necessary to provide context for our analysis.
- » *Diagnose.* Based on what we hear and see, we analyze relevant aspects of the agency, such as daily operations, organization structure, the use of technology, management and monitoring systems, and the degree to which performance measures and standards exist and are being used. We concentrate on how work is planned, managed and executed, knowing that most performance issues are caused by systemic problems.
- » *Compare.* For most projects, we look at industry standards and best practices from across the nation. Not every best practice or standard is appropriate for any given jurisdiction, so we take care in selecting those that will work well in your circumstances. Many projects also include peer benchmarking surveys to create a context for the level of investment and performance. We work with you to identify the right peer group, making sure the analysis is both relevant and appropriate.
- » *Identify Opportunities.* When the investigation and data gathering activities are complete, we are able to analyze the information and identify changes that will increase efficiency and/or improve service delivery. Every human organization has opportunities for improvement. The challenge is to identify those that are realistic, cost-effective and will produce better service to the public.



- » *Implement Solutions.* Management Partners has a strong bias for implementation. Our work goes beyond providing good analysis to providing concise, actionable recommendations. We also support implementation to help improve efficiency and realize cost savings, when appropriate.

Ensuring a High-Quality Outcome

Management Partners goes to unusual lengths to ensure our work is of reliably high quality. Our reports and other deliverables are subjected to careful internal control processes so our deliverables meet your needs and are of excellent quality.

Before we develop a draft report, we meet with your project team to discuss our observations and preliminary recommendations to solicit your feedback and identify any implementation issues. Each deliverable undergoes a peer review process within the firm to see that it meets Management Partners' standard of excellence, with thoughtful analysis leading to clearly stated and actionable recommendations. In addition to our own high standards, we also survey each client when a project is complete to learn how we can improve.

Achieving Results

Management Partners has worked for the majority of our clients on multiple occasions. They consistently tell us that they use our services on a variety of projects because our work provides implementation actions that accomplish their objectives. Management Partners is led by local government experts who know how to get things done, appreciate the difficulties and the constraints on local leaders, and understand the essential elements that effectively drive implementation. These elements include:

- » Creating a sense of urgency;
- » Engaged leaders;
- » Well-developed implementation planning;
- » Frequent communication with stakeholders;
- » Planned milestones and completion dates; and
- » Institutionalized management processes.

Implementation is effective only if there is an expectation and commitment to it. We use well-grounded management techniques to effectively shape organizational culture so that project goals can be realized.

Proposed Work Plan

Based on our experience with financial modeling and our understanding of the needs of the City of San Leandro, we have prepared a plan of work to create a state-of-the-art fiscal model. This framework is amenable to refinements, based on your input.

Activity 1 – Start Project and Conduct Kickoff Meeting

Management Partners will begin this project with a careful learning phase, starting with a planning meeting with managers to ensure we have a clear understanding of your objectives for the long-term forecast model. The purpose of the meeting is to finalize the scope of work and hear about the business concerns giving rise to the project so the plan of work and schedule are precisely tailored to your needs. We will keep you informed of our progress throughout the project.

In advance of this meeting, we will prepare a data request and submit it to you. We will begin reviewing the data prior to the kickoff meeting so we can ask clarifying questions and seek additional data as needed. That will enable us to have all of the required data in a timely manner.

We know that the work associated with this project is in addition to the normal work of the organization. Our goal is to integrate our activities in a manner that is thoughtful and minimizes disruption to the City operations. However, the cooperation of staff in providing requested data and giving meaningful feedback is crucial to a successful project.

Activity 2 – Prepare Long-Term Financial Forecast

During this activity, we will prepare a ten-year forecast using City data. The financial forecast will include the components described below.

- » **Identify baseline revenue and expenditure assumptions.** We include expenditure assumptions related to remaining competitive in the labor marketplace, meeting funding requirements for pension commitments, sustaining internal service fund levels that lead to timely replacement, reserves, and other major factors. The revenue assumptions will include all major existing revenue sources along with the identification of risk factors pertaining to any of those sources. All assumptions will include maintaining fund reserves, sustaining internal service funding to meet replacement cycles, meeting pension obligations, fulfilling debt service obligations, remaining competitive with regional neighbors regarding labor contracts, and other factors identified by staff. The forecast will include trend data.
- » **Provide revenue and expenditure estimates.** The estimates will cover the current year and ten years into the future for General Fund categories. Categories for revenue include: property tax, sales tax, transient occupancy tax, utility users tax, franchise fees, business license taxes, fines, forfeitures, penalties, revenue from the use of money and property, real property transfer tax, licenses, permits, cannabis-related tax, special revenues, gas tax, and intergovernmental charges for current services. Categories for expenditures include salaries, labor-negotiated premiums, overtime and benefits,

services and supplies, contractual fire services, other post-employment benefits and equipment for fire, capital outlay, debt service, internal service fund charges, termination payouts, and legal fees. We will create separate estimates for Capital Improvement Program labor, retiree medical premiums, and non-labor expenditures.

- » **Create model scenarios.** The ten-year forecast will be written in Excel and will have model scenarios, including a baseline and scenarios with different sets of assumptions. Scenarios above the baseline will include unmet needs that have been quantified by the City, such as capital, maintenance, internal support and service level increases. The model will allow users to make changes and see the effects of those proposed changes, from the addition of employees or a recession to new taxes.
- » **Create an economic forecast for the local, state and national economy.** The forecast will include trends on housing, employment, inflation and gross domestic product and will detail their effects on the City's General Fund. Our models typically include the assumption of a moderate recession approximately every seven years which can be expected in California.

The fiscal forecasting model will display information for both the calendar and fiscal year and will display information in both summary and detailed formats.

We will develop a draft and then review it with management staff to refine and validate our assumptions. We are careful to tie back all model data to City source documents and to fully explain the assumptions that underlie the model. After reviewing the model with City managers, we will make refinements and develop a final model suitable for presentation.

Activity 3 – Report Results

During this activity we will prepare a transmittal memorandum describing the results of the forecast, which will accompany the final forecast model. We will present the financial forecast to the City Council in a PowerPoint format. This will allow for an interactive discussion of the model, including the impact of changing various assumptions on the forecast.

Activity 4 – Support Implementation

Management Partners has a strong bias for action. Our reports and resulting recommendations become tools for setting priorities, and for developing work plans. When developing a fiscal model our plan is to train staff on all the capabilities of the model with the expectation that the staff will “own” and begin using the model as a daily tool.

After our presentation to the City Council, we will train staff on the model. We will provide full documentation in a user's manual. We will also continue to meet with City staff about the forecast two times per year and will update it annually or more often if requested.

Optional Activity – Develop Budget Strategies

If desired, Management Partners will assist the City in developing strategies to address the fiscal model scenarios. This will be a second phase and a separate scope will need to be developed.

About Management Partners

Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. Since then we have worked with cities, counties, towns, and special districts of all sizes across the United States to help them work more effectively and run more efficiently.

Why Management Partners?

We offer a balance of perspectives with a practitioner's bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces positive outcomes. We are proud to say that as a result of our quality work, many of our clients ask us to complete subsequent assignments. Ask our clients and they'll tell you:

| | |
|---|--|
| We Know Local Government | Our associates have served in local governments, so we have a deep understanding of the operating and political environments in which you work. |
| We Take a Collaborative Approach | We consider ourselves part of your team and strive to ensure our work supports your overall corporate strategy and goals. |
| We Have Extensive Experience | Each of our more than 80 associates is an expert in one or more service areas, and our firm has assisted hundreds of jurisdictions in 42 states. |
| We Have Developed Proven Methodologies | We understand the importance of a holistic approach to improving organizations, using field-tested techniques for each aspect of the work. |
| Our Work Plan Is Tailored to Your Needs | Each of our projects is individually tailored to our client's unique needs, starting with a careful learning process. |
| We Take Pride in the Quality of Our Work | Our internal processes ensure first-rate, complete staff work and adherence to the highest ethical standards in public service. |
| We Are Focused on Implementation | As practitioners, our recommendations make practical sense and are designed for implementation. |

Taking a Collaborative Approach

Success in the public sector requires an approach that is inclusive, collaborative, respectful of differing viewpoints, and appreciative of democratic self-government, with its focus on extensive input and diverse opinions. This philosophy governs our work, and it will be a key element in how we approach this work for San Leandro.

We view each project as an opportunity to design the best possible approach to achieve the desired results. At the beginning of our partnership we work with you to design a work plan

and schedule that takes into account the needs of your organization. We are sensitive to the impact a project can have on busy staff and plan our work accordingly to minimize disruption.

We often involve employees throughout the enterprise in the project because they are in the best position to know what works. When they have a chance to express their concerns and share their ideas they are more likely to support the changes that need to be made to improve.

Recognizing that Every Organization Is Unique

Because we have partnered with hundreds of local governments across the country, we understand that every place has unique circumstances, challenges and opportunities. As a result, we do not use a cookie-cutter approach to our projects. Instead, we start by talking with you to understand what makes your organization different. Then we develop recommendations that make sense given your resources, history, goals and circumstances.

From Recommendations to Implementation

Management Partners has a strong bias for action. Our reports and resulting recommendations become tools for setting priorities and for developing department and division work plans. After completing the project report, we prepare a draft Implementation Action Plan, incorporating each recommendation in the project report. The draft action plan lays out the steps required for implementation, assigns responsibility for action, and identifies a priority level (immediate, near or long term) for initiating each recommendation.

The action plan is prepared as a draft and becomes final once directors and managers integrate the action steps into their plans of work and identify actual dates for planned completion. The action plan offers an important management tool for implementation of the work reflected in the project report.

Services to Support Local Government Leaders

Management Partners' services include everything required to support local government leaders. The range of our services includes:

- » *Financial Planning, Budgeting and Analysis* – Managing the financial affairs of the enterprise, performing multi-year financial planning, and developing a well-structured, transparent budgeting process supported by thorough analysis.
- » *Organization Assessments* – Analyzing the organization (including structure, staffing, business processes, policies and resources) to identify improvements to an operation's efficiency and effectiveness.
- » *Organization Development* – Developing organizational capacity, a key to high-performance organizations, through executive coaching, customer service training, employee and customer surveys, and conflict management workshops.
- » *Performance Management* – Systematically tracking the performance of the enterprise, including performance measurement, process management, performance budgeting, employee performance evaluation, and strategic and process benchmarking.

- » *Process Improvement* – Critically examining specific business processes through which internal or external customers are served to identify opportunities for improvement using process mapping, performance improvement workshops, and other quality tools.
- » *Strategic and Business Planning* – Setting the direction for the enterprise and preparing business plans required to achieve desired outcomes.
- » *Sharing and Consolidation of Services* – Improving the cost-effectiveness and quality of service delivery by partnering with other units of government through sharing or consolidation.
- » *Interim Management Services* – Assisting government leaders by providing executive staff during transitional periods. Our approach combines continuing services along with analyzing organizational effectiveness to provide a solid foundation for a new permanent employee.
- » *Executive Recruitment* – Identifying top quality leaders who are a good fit for your organization and your community.

Your Partner

Management Partners has helped hundreds of local government leaders in 42 states improve their service to the public. The work we do is not an academic exercise; it is grounded in the real world of customer service and accomplishment in the public sector. We will work closely with you to produce the desired results, focused on achieving your goals and mission.

Our Project Team

Management Partners has a strong project team that is well qualified to complete this work for the City of San Leandro. Our team of professionals includes individuals who have direct experience with the management and operations of City governments, as well as public finance and economic analysis. They also have extensive experience with the financial analysis of municipal service delivery, and real-world experience developing budget balancing strategies. In addition, we are very familiar with the range of service delivery parameters and commonly utilized benchmarks and performance measurements.

Andrew Belknap will serve as project director, overseeing the substantive work of the project with responsibility for reviewing and approving all deliverables. Robert Leland will serve as project manager and will be responsible for execution of the project. The team will also be supported by an experienced analyst, Mandy Brown. Brief qualifications for each team member are summarized below.

Andrew Belknap, Regional Vice President

Andrew is responsible for Management Partners' western operations, based in San Jose and Costa Mesa, California. He has more than 20 years of local government experience, including service as a city manager, public works director, and consultant to California municipalities, counties and special districts. His areas of expertise include fiscal and budget analysis, municipal restructuring, governance models and developing service delivery partnerships and functional consolidations to take advantage of economies of scale in public sector service delivery. With Management Partners, Belknap has served well over 100 California local governments, many on multiple occasions, including 17 of the largest 20 cities. A trained economist, Andy brings a special expertise to fiscal analysis and public finance issues. His blend of quantitative skills, coupled with a practitioner's understanding of public services and management systems, adds value to all types of organizational and policy analysis.

Robert Leland, Special Advisor

Bob joined Management Partners in 2012, after 37 years of experience in state and local government finance. He was director of finance for 26 years for the City of Fairfield, California; a city known for its entrepreneurial management and long-term financial planning. He has been preparing long-range forecasts and budget models since the early 1980s. He previously served as assistant finance director for the City of Sacramento, where he managed the city budget, and as a staff consultant to the Assembly Revenue and Taxation Committee, where he drafted and analyzed legislation and worked on the team implementing Proposition 13 in 1978.

Since 2010 Bob has consulted in his area of special expertise, municipal budgeting and long-range forecasting. He is a leader in his profession, having been elected by his peers as president of both the California Society of Municipal Finance Officers and the League of California Cities' Fiscal Officers Department. Bob was the recipient of the 2010 Award of Excellence in Public

Finance from the California Public Securities Association, which recognizes exceptional work, creativity, service and leadership by a municipal finance professional.

Mandy Brown, Management Analyst

Mandy is responsible for conducting financial and operational analyses to support many types of client projects including organization reviews, process improvement, financial planning, and budgeting studies. She has a background in urban planning and statistics with significant community engagement and project management experience. Her analytic training includes inferential statistics, linear and logistic regression, and survey research and design. She is experienced in collecting data and using analysis and modeling tools for forecasting, policy analysis, and the design of projects and plans.

Experience and References

We have provided several references for projects that have involved fiscal modeling. Our basic approach was developed in Stockton, California, during the City's bankruptcy in FY 2012-13. Because Stockton leaders were negotiating with several very large creditors with highly sophisticated financial advisors, we developed a detailed approach that could withstand scrutiny and challenge.

In addition to the references below, our website, managementpartners.com, has information about our past clients, which includes hundreds of jurisdictions in 42 states. You are welcome to contact any of them about our performance.

We have several long-range financial plans underway now for clients. We have provided several references below for jurisdictions for whom we have completed financial plans.

Stockton, California

Mr. Kurt Wilson
City Manager
425 N. El Dorado St., 2nd floor
Stockton, CA 95202
(209) 937-8212

Ms. Kimberly Trammell
Budget Officer
425 N. El Dorado St., 3rd floor
Stockton, CA 95202
(209) 937-5088

Long Range Financial Plan

Management Partners was engaged to coordinate the City's bankruptcy process in early 2012, following a financial assessment in late 2011. A major element of this work was the preparation of a 30-year Long Range Financial Plan that demonstrated the city's ongoing financial viability under their Chapter 9 plan of adjustment. The Long Range Financial Plan withstood repeated court challenges as the city emerged from bankruptcy; and is still used today to set guidelines for the annual budget and labor negotiations. Management Partners updated the budget model in September 2017.

Davis, California

Mr. Dirk Brazil
City Manager
City of Davis
23 Russell Blvd
Davis, CA 95616
(530) 757-5602
dbrazil@cityofdavis.org

Twenty-year Financial Forecast Model

Management Partners was engaged to prepare a 20-year forecast for Davis' general fund. The result was a clear picture of the city's finances and a model that could be easily updated by staff in the future. The model contains modifiable assumptions affecting major revenue and expenditure types. It includes a methodology for estimating long-term CalPERS and other post-employment benefits (OPEB) costs and is linked to the results of city studies on street resurfacing, facility and park needs. The model shows the impact of various assumptions on fund balances so policy makers can make decisions about service levels, capital project commitments, changes in tax structure, and employee compensation. The model serves as a valuable planning tool that allows the city to analyze how budget decisions today will affect future financial sustainability.

| Oxnard, California | |
|--|--|
| <p>Ms. Maria Hurtado (former Oxnard Assistant City Manager) Assistant City Manager City of Hayward 777 B Street, 4th Floor Hayward, CA 94541 (510) 583-4305 maria.hurtado@hayward-ca.gov</p> | <p>Long Range Financial Plan and Financial Consulting Services Management Partners was engaged to provide a financial assessment in fall 2014 which identified numerous operating deficits and financial management issues. As a follow-up we prepared a long range financial plan that linked 131 city funds and modeled the impact of corrective budgetary actions. The city used the model to generate the tables for their 2015-16 budget document and to identify the impact of labor memoranda of understanding negotiated in 2016. Management Partners continues to provide assistance to Oxnard on a variety of financial projects.</p> |
| Yuma County, Arizona | |
| <p>Ms. Susan Thorpe County Administrator 198 South Main Street Yuma, AZ 85364 (928) 373-1010 susan.thorpe@yumacountyaz.gov</p> <p>Mr. Jim Flory Budget Director 198 South Main Street Yuma, AZ 85364 (928) 373-1108 jim.flory@yumacountyaz.gov</p> | <p>Long Range Fiscal Model Management Partners provided a fiscal model for this county in southern Arizona. With some 99 separate funds, the model is exceptionally complex. It uses appropriate custom assumptions for expenditure and revenue drivers for each fund. After completing and presenting the fiscal model, Management Partners has provided ongoing services to the County by updating the model based on budget changes and training staff on how to modify and use the model on an ongoing basis.</p> |

Hours and Cost

Management Partners anticipates devoting 226 hours of our staff time to complete the plan of work described above. The total cost of this project is \$43,000, which includes all of the services listed in the RFP, including updates to the forecast, as well as fees and expenses. The ultimate test of a quality project is that the client is pleased with the results, and we are committed to achieving that goal.

If the City desires assistance developing strategies to address the fiscal model scenarios, we will prepare a separate scope with a separate cost proposal.

Conclusion

Management Partners has the experience, the professional talent, and the commitment to quality necessary to successfully complete this project for San Leandro. We welcome the opportunity to provide additional information that may be helpful, and we look forward to the chance to discuss the ideas contained in this proposal.

Cover photo courtesy of the City of San Leandro Facebook page.

Attachment A – Project Team Resumes

ANDREW S. BELKNAP

Andrew Belknap, Regional Vice President, has more than 20 years of diverse local government management experience. He has served in California local government as a city manager, public works director and independent consultant. As a consultant, he has directed many diverse projects and provided interim management assistance for cities, counties and special districts. Andy has been with Management Partners since 2001 and leads the operations of the western region, which is based in San Jose, California. He directs the work of approximately 20 full-time staff members.

Andy began his public service career in 1980 with the City of Oxnard, California, in facilities management. He created the city's first automated database for tracking infrastructure maintenance and gained statewide recognition for the city's energy management program. Eventually, Andy was named chief of staff to the public works director and was responsible for budgeting, utility rate setting, capital program management and organizational analysis.

In 1989, Andy was named city manager of Ojai, a nationally known resort community (he had been public works director there for the previous three years). Andy brought leadership and fiscal stability to a community that had been through a difficult period of political controversy, staff turnover and financial troubles. When he left this position in 2001, the city had achieved a reputation for credibility, professionalism, teamwork and innovation. While with the City of Ojai, Andy completed several major redevelopment projects including a difficult upgrade of unreinforced masonry in an historic downtown area, and several innovative affordable housing projects. He also negotiated an agreement (the first of its kind) with the Ventura County Sheriff for joint financing and construction of a new police station. At the regional level, as chair of his region's California City Manager's Association, in 1998 Andy helped devise a successful plan to create a joint powers library authority to serve seven cities and over 600,000 residents. He has served on several League of California Cities working groups and was selected to represent the Santa Barbara area on the California City/County Youth Services Task Force.

Since joining Management Partners in 2001, Andy has participated in over 190 individual consulting projects for cities, counties and special districts in California, Arizona, Nevada, Washington, Idaho and Montana. He has served as the key professional or project manager for most of these assignments. Clients range from very small to very large and include the cities of San Jose, Santa Ana, Fremont, Stockton, Long Beach and Sacramento; the counties of Orange, Marin, Monterey, San Mateo and Ventura; and large special districts such as the Sacramento Port District and the Los Angeles Community College District. As a corporate officer with Management Partners, Andy has helped develop the firm's consulting methodology, standards of practice and market presence, which has enabled the firm to successfully complete over 600 separate engagements for hundreds of local governments throughout the United States.

As an economist, Andy brings a special expertise to public finance issues, including the analysis of local revenue measures. He has completed a broad range of organizational and management studies, cost-of-service and fiscal analyses, inter-jurisdictional service delivery studies, service consolidation and coordination efforts and other complex projects.

Andy earned a bachelor's degree in math/economics from the University of California, Santa Barbara, and a master's degree in economics, with a specialty in public finance.

ROBERT C. LELAND

Bob Leland, Special Advisor, joined Management Partners in 2012 after 37 years of experience in state and local government finance. He was director of finance for 26 years for the City of Fairfield, California, a city long known for its entrepreneurial management and long-term financial planning. He previously served as assistant finance director for the City of Sacramento, where he managed the city budget, and as a staff consultant to the Assembly Revenue and Taxation Committee, where he drafted and analyzed legislation and worked on the team implementing Proposition 13. Since 2010 he has consulted in his area of special expertise, municipal budgeting and long-range forecasting.

Bob has been a leader in his profession, having been elected by his peers as president of both the California Society of Municipal Finance Officers and the League of California Cities' Fiscal Officers Department. He also served on the League's board of directors and worked on several League task forces including Prop 1A.

He has served on several statewide bodies, including the California Debt and Investment Advisory Commission, the California Asset Management Program (as a founding member and president), and the California Statewide Communities Development Authority. He also served as a member and chair of the City of Davis' Finance and Economics Commission.

Bob received the Distinguished Service Award from the California Society of Municipal Finance Officers in February 2018. He was the recipient of the 2010 Award of Excellence in Public Finance from the California Public Securities Association, which recognizes exceptional work, creativity, service and leadership by a municipal finance professional.

Bob earned a bachelor's degree in political science from the University of California at Santa Barbara and a master's degree in public policy from the University of Michigan at Ann Arbor.

MANDY BROWN

Mandy Brown, Management Analyst, joined the Management Partners team in 2017. She is responsible for conducting financial and operational analyses to support many types of client projects, including organization reviews, process improvement, financial planning and budgeting studies. She has a background in urban planning and statistics with significant community engagement and project management experience. Her analytic training includes inferential statistics, linear and logistic regression, and survey research and design. She is experienced in collecting data and using analysis and modeling tools for forecasting, policy analysis, and the design of projects and plans.

Mandy's educational experience enables her to understand the roles of officials, stakeholders, and community members in planned change. Her urban planning background provides integrative tools for plan formulation, adoption, implementation and enforcement. Based on her understanding of community involvement coupled with quantitative expertise, she can integrate data from stakeholder participation to create compelling plans and presentations.

Prior to joining Management Partners, she was employed as a finance and operations analyst at an educational nonprofit organization. She was responsible for project coordination of the organization's Conditional Use Permit application and project development team. She also coordinated benchmarking data collection and analysis among peer organizations.

Mandy earned a bachelor's degree in hospitality administration with a minor in statistical methods from Boston University. She received her masters of urban planning from San José State University with an Advanced Certificate in Real Estate Development. She is currently enrolled in the masters of public affairs program through Indiana University's School of Public and Environmental Affairs.