



**UC Extension and the California Debt and Investment Advisory Commission  
Present**

**FUNDING AND FINANCING OF MAINTENANCE AND PUBLIC  
INFRASTRUCTURE USING SPECIAL ASSESSMENTS  
Approaches for Achieving Successful Outcomes**

September 18, 2014  
UC Davis Extension Sutter Square Galleria, Sacramento, CA

## **Agenda**

In recent years special assessments have been subjected to legal challenges based on interpretations and applications of Proposition 218. The court decisions that resulted from these challenges have placed communities in a state of uncertainty and led to a decline in the use of this tool to pay for public maintenance and capital improvement projects. This seminar considers the implications of the court's actions, how practicing assessment engineers and other public finance professionals have responded, and the opportunities to use assessment districts in the future.

**8:30 AM      Registration**

**9:00 AM      Welcome**  
Mark Campbell, Executive Director, CDIAC

### **Session One**

**9:05 AM      Proposition 218 and the Legal Framework of Assessment Districts in California**  
Speakers will provide a summary of existing constitutional and statutory law as it relates to establishing a district and the types of facilities and services that may be funded under each statutory scheme. Bond financing options using assessments will also be discussed.

## **Session Two**

- 10:00 AM      Recent Appellate Court Decisions and What They Mean to Assessment Districts**  
This session identifies the key California Supreme Court and appellate court decisions affecting districts and how each decision has changed the landscape of special assessments.
- 11:00 AM      Break**

## **Session Three**

- 11:15 AM      Part 1: Current Practices for Determining General and Special Benefit in Assessment District Financing**  
This session addresses the structure and content of the assessment district engineer's report, identifying general and special benefits and allocating project costs to benefitted parcels. In addition, the discussion will focus on the adjustments assessment engineers may consider in identifying and quantifying special benefits in response to recent appellate court decisions. These adjustments constitute the first step towards developing a new body of "best practices."
- 12:30 PM      Luncheon (For All Participants and Speakers)**
- 1:30 PM      Part 2: Current Practices for Determining General and Special Benefit in Assessment District Financing**  
Speakers share approaches being employed by assessment engineers to fund maintenance using assessment districts.

## **Session Four**

- 2:45 PM      When is Using a CFD a Better Choice?**  
Speakers address how public agencies, public finance professionals, assessment engineers, and development community view and approach assessment districts. This final session also covers the conditions under which using a Communities Facilities District may be a better alternative than an assessment district for funding capital improvements or municipal maintenance or services.
- 4:00 PM      Close of Seminar**

## **FACULTY**

Dennis Anderson, Director of Financial Engineering, Harris & Associates

Jim Fabian, Principal, Fieldman, Rolapp and Associates

Chris Fisher, Group Manager of Financial Consulting Services, Willdan Financial Services

Pablo Perez, Director, NBS

Kelly Salt, Partner, Best Best & Krieger LLP