



SAFER Council

May 20, 2021

Rob Moody, CPA | Partner

Jordan Henderson, PE, PMP | Sr. Consultant



INTRODUCTION

Who is Merina+Co?

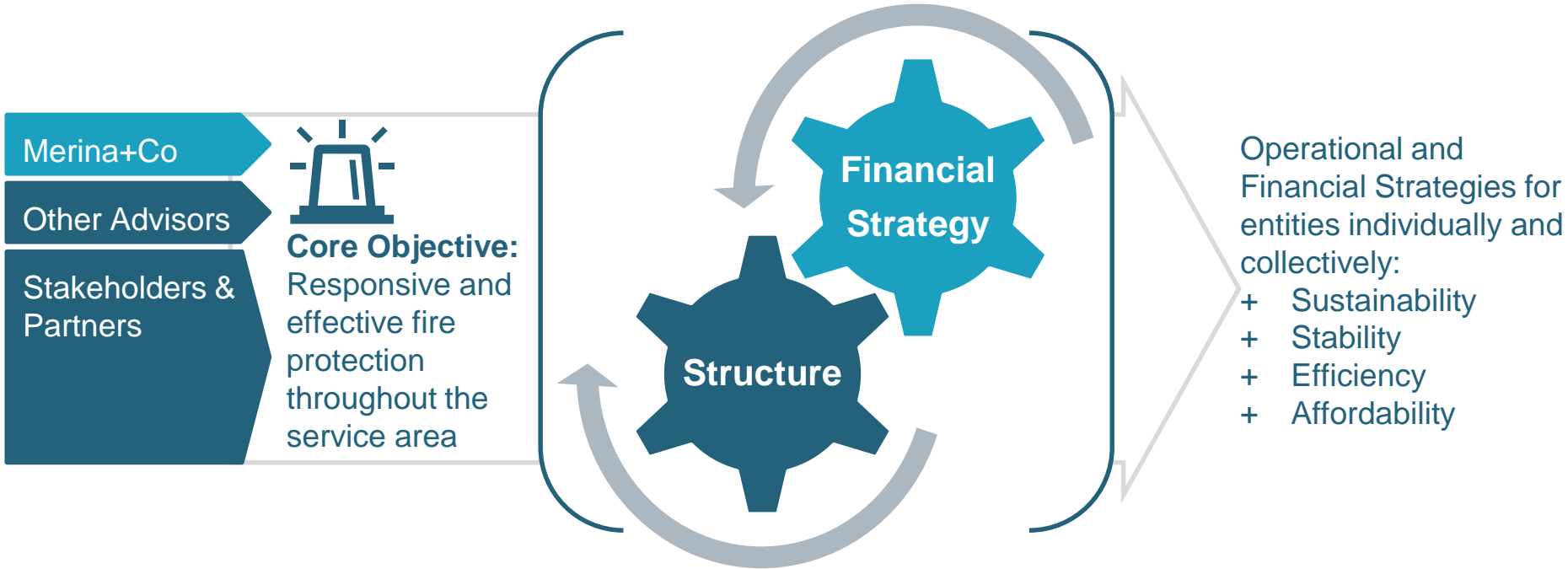
- + Providing comprehensive Advisory and Assurance Services to Government since 1979
- + Located in Tualatin, Oregon
- + *Focused on Your Wants and Understanding Your Needs*

Why Merina+Co?

- + Experience and reputation as experts in all aspects of local government finance and operations
- + Understanding of Public Safety
- + “Listen-first” style and approach



Understanding of Project



Approach

- + Initiation
- + Analysis
- + Results



- Listening
- Document Request and Review
 - + Assessed values by entity
 - + Respective tax rates and levies
 - + Financial statements
 - + Budgets



Approach

- + Initiation
- + Analysis
- + Results



- Develop Understanding:
 - + Structure
 - + Costs / Cost Drivers
 - + Resources
- Modeling
 - + Respective tax rates
 - + Compression
 - + Cost drivers
 - + Other variables



Approach

- + Initiation
- + Analysis
- + Results



- ❑ High value information
- ❑ Support for clear direction
- ❑ Individualized data and analysis



Value Proposition

- + Analysis designed to assist you in making informed decisions individually and collectively
- + Understanding of tax implications for each entity based on varying assumptions
 - Detailed review of District and overlapping tax rates
 - Rates not subject to limitation (bonds)
 - Compression analysis
- + Plain language communications



Timeline/Costs

Once engaged, we estimate 3-4 months to complete the analysis and present findings.

- + Initiation and data gathering (30-50 hours)
- + Understanding and analysis (60-80 hours)
 - Modeling
 - Scenario analysis
- + Communications
 - Meetings and Discussions (6-10 hours)
- + Presentation of Results (20 hours)

Estimated Project Costs:

\$32,000 – \$45,000

Additional Analysis and/or Scope: TBD



CONNECT WITH US



Rob Moody, CPA
Partner

 rmoody@merina.com

 [/in/robert-g-moody-jr/](https://www.linkedin.com/in/robert-g-moody-jr/)

Jordan Henderson, PE, PMP
Sr. Consultant

 jhenderson@merina.com

 [/in/jordan-m-henderson](https://www.linkedin.com/in/jordan-m-henderson)

