



C. G. UHLENBERG LLP

CERTIFIED PUBLIC ACCOUNTANTS

Overview of the Firm and this Proposal

We have prepared this proposal in response to your request to provide impartial third-party tabulation services for the Santa Clara Valley Water District. We know that given the current deadline the District faces, you are very busy; therefore, we have made this proposal straightforward and have designed it to make it easy for you to evaluate our firm based on pertinent selection factors:

- Scope of work to be performed
- Qualifications
- Names and qualifications of individuals to be assigned
- Approach, technique, and schedule
- Fee Schedule

We would like to provide some information about us as you consider C.G. Uhlenberg, LLP as your impartial third-party evaluators:

- Our firm has been servicing the Bay Area for 90 years
- We have an excellent record of quality work and great client service and we hope you will have an opportunity to contact our references for their perspective
- We have successfully undergone a stringent peer review process by external evaluators as well as providing peer review services to other CPA firms

Please visit our website at www.cgucpa.com for further information. Our most recent Peer Review report, as well as additional information about our firm, is posted there.



Proposal Responses

- Description of Firm
 - C. G. Uhlenberg LLP (CGU) was founded as a sole proprietorship in 1927 and became a partnership in 1947. Including two partners, our staff represents a full spectrum of auditors, tax advisors, accountants, and consultants to collectively accomplish the objectives and goals of our clients.
 - CGU is committed to maintaining its most important assets—our clients. We serve a diverse clientele with simple to complex tax and accounting needs. Our clients include a range and cross section from individual taxpayers to multi-state corporations.
 - We recognize the importance of involvement in professional associations and, therefore, encourage employee membership in various organizations including the American Institute of certified Public Accountants, the California Society of CPAs, Government Finance Officers Association, and local civic groups.
- In the past 80 years C.G. Uhlenberg has not defaulted on any contract and strives to always complete the work in a timely and professional manner.
- References
 - Santa Clara Valley Water District
Stan Yamamoto, District Counsel
(408) 265-2600
Acted as impartial third party during validation and tabulation of prior Proposition 218 ballot
 - Alameda County Mosquito Abatement District
John R. Rusimel, District Manager
(510) 941-4010
Provided tabulation and validation services to the District with over 50,000 votes tabulated and validated within a two week period
 - Shilts Consultation, Inc
John Bliss, Partner
(707) 430-4300
Provided independent tabulation and validation services to three other vector control districts through contracts with SCI. The largest of which was over 100,000 ballots and required verification for address and signature.



- C.G. Uhlenberg, LLP is proud of its environmentally conscious business practices
 - We are one of the few locally owned CPA firms that has gone totally paperless
 - Brought copying/printing down from 500,000+ pages per year to less than 35,000 pages
 - Our paperless systems allow staff to work at home further reducing our impact on the environment
 - We strive to keep abreast of the latest server developments and have gone with Microsoft Virtualization technology which allowed reducing physical servers by more than half
- We are one of the few local CPA firms qualified to oversee a tabulation of a 218 ballot count. Jeff Ira's position as former Mayor of Redwood City provides additional insight on the complexity of a 218 ballot initiative
- Based on prior experience with the District we will provide oversight and validation of the tabulation procedures, including:
 - Provide manager level or above personnel to oversee all aspects of the count
 - Document and provide written narrative of entire tabulation procedure for public publication

Evaluation Team

We are pleased to present the validation team for the District if awarded the contract. Our commitment to excellence is evidenced by the selection and development of our staff. We believe our professionals are the crucial link in providing the distinctive quality of service CGU prides itself on. Consequently, we take every measure to ensure we employ those with the education, motivation, and skills consistent with the firm itself.

Keeping abreast of the ever-changing laws and regulations set forth by government agencies is an important aspect in providing quality service. CGU meets the challenge with a combination of on-the-job guidance, formal training, and technical review to provide the necessary insight to perform governmental audits.

Jeff Ira, CPA Partner

Jeff brings more than 30 years of experience to CGU. Since joining CGU in 1984, he has developed relationships with clients based on creativity, integrity, and trust. He is a member of the AICPA, California Society of CPAs, the GFOA, and the CSMFO.

Jeff cares about his community and clients which enables him to make a difference. He has been on the City Council in Redwood City for 12 years and is the former Mayor of Redwood City. He also serves on the Board of Directors at a number of community organizations. This involvement creates a unique ability to view things from a different perspective which has been invaluable to our governmental and not-for-profit clients.



Ryan Kanazawa
Manager

Ryan holds a B.S. in Marketing and Finance from Santa Clara University. He joined our firm in 2005 after spending 8 years in the banking industry. He has been in charge of our tabulation division for the past seven years and has overseen both small and large vote tabulation projects. Ryan holds multiple certifications including Microsoft Certified, Gold Partner, and Microsoft GP certified. In addition to being part of CGU's team, assisting our clients, and maintaining our own internal network and security, he also runs an IT firm consulting where he has worked on various projects such as IT audits, security testing, network administration, accounting system support, and IT consultation. Ryan's years of experience working with various sized operations are a valued contribution to the team.

Audit Fee

Below are the standard hourly fees for the District's reference. We have discounted our 2016 standard rates for this proposal. A similar discount would be applied for future years and our rates would not increase more than 2.5% per year.

	Standard Rate	District's Rate
Level		
Partner	\$ 390	\$ 340
Director	\$ 250	\$ 198
Manager	\$ 195	\$ 150
Senior Staff	\$ 140	\$ 115
Staff	\$ 115	\$ 100

Due to the variable nature of such tabulations our contract bid is based on an hourly basis plus cost of travel and report preparation. We believe that we offer great services and value regardless of the length of the contract and this is reflected in our pricing. Last year's Groundwater Charge Protest Tabulation required seventeen and a half hours of manager/oversight time and two hours of partner level interaction.

Time Line

Based on prior experience SCVWD and with Proposition 218 ballot validation and tabulation we estimate time required between one and three days.

Jeffrey J Ira
Partner