



Legislation Details (With Text)

File #: 19-1220 **Version:** 1 **Name:** FM - Avenu Insights & Analytics to examine all records related to sales, use, and transaction and use tax

Type: Resolution **Status:** Adopted

File created: 10/24/2019 **In control:** City Council

On agenda: 12/10/2019 **Final action:** 12/10/2019

Title: Recommendation to authorize City Manager, or designee, to execute an agreement, including any necessary amendments, with MuniServices, LLC, dba Avenu MuniServices, LLC, for sales, use, and transaction and use tax projection, analysis, and consultant services, in an annual amount not to exceed \$12,000, for a period of one year, with the option to renew for four additional one-year periods, at the discretion of the City Manager; and

Adopt resolution authorizing MuniServices, LLC, dba Avenu MuniServices, LLC, to examine all records related to sales, use, and transaction and use tax, collected by the California Department of Tax and Fee Administration. (Citywide)

Sponsors: Financial Management

Indexes:

Code sections:

Attachments: 1. 121019-C-5sr&att.pdf, 2. RES-19-0194.pdf

Date	Ver.	Action By	Action	Result
12/10/2019	1	City Council	approve recommendation and adopt	Pass

Recommendation to authorize City Manager, or designee, to execute an agreement, including any necessary amendments, with MuniServices, LLC, dba Avenu MuniServices, LLC, for sales, use, and transaction and use tax projection, analysis, and consultant services, in an annual amount not to exceed \$12,000, for a period of one year, with the option to renew for four additional one-year periods, at the discretion of the City Manager; and

Adopt resolution authorizing MuniServices, LLC, dba Avenu MuniServices, LLC, to examine all records related to sales, use, and transaction and use tax, collected by the California Department of Tax and Fee Administration. (Citywide)

City Council approval is requested to enter into a contract with MuniServices, LLC, dba Avenu MuniServices, LLC (Avenu), for sales, use, and transaction and use tax projection, analysis and consultant services. City Council approval is also requested to adopt a Resolution authorizing Avenu to examine all records related to the City of Long Beach (City) collected by the California Department of Tax and Fee Administration (CDTFA). State law requires that local jurisdictions adopt a Resolution authorizing outside consultants to review CDTFA records to perform revenue recovery and projection services. In addition to an approved Resolution authorizing access to City data, State law also requires an approved contract between the City and consultant for services.

The City previously retained the services of Avenu for consultant services for sales tax and transaction and use tax auditing, projection, and recovery. The previous contract has since ended; however, the City requests that Avenue continue supporting the City with forecast reports and analysis. In response to the Request for Proposals (RFP) released in 2018, Avenu and Hinderliter, de Llamas & Associates (dba HdL Companies) were the only vendors that submitted proposals. HdL was selected as the City primary sales, use, and transaction and use tax consultant, however staff is recommending that Avenu be added to support the City as an additional resource for forecast reports and analysis.

The reports by Avenu will supplement the work of the City's current sales and use tax consultant, HdL Companies. It is currently anticipated that the City will require forecast reports twice per year, but additional reports may be requested as-needed. Each forecast report will include current and out year projections for both Bradley Burns and Measure A revenues with a summary of key projection assumptions.

This matter was reviewed by Deputy City Attorney Amy R. Webber on November 20, 2019, Purchasing Agent Tara Yeats on November 15, 2019, and by Revenue Management Officer Geraldine Alejo on November 12, 2019.

City Council action is requested on December 10, 2019, to ensure the contract and Resolution is in place expeditiously.

The annual contract amount will not exceed \$12,000. Costs will be funded within current resources in the General Fund Group in the Citywide Department. This recommendation has no staffing impact beyond the budgeted scope of duties and is consistent with existing City Council priorities. There is no job impact associated with this recommendation.

Approve recommendation.

[Enter Body Here]

JOHN GROSS
DIRECTOR OF FINANCIAL MANAGEMENT

APPROVED:

THOMAS B. MODICA
ACTING CITY MANAGER