



Richard Berkson

Principal, Berkson Associates

EDUCATION

Master of Public Policy,
University of California,
Berkeley

Bachelor of Arts in Social
Science, University of
California, Berkeley

Undergraduate study in
Engineering, Massachusetts
Institute of Technology (2.5
semesters)

AFFILIATIONS

CALAFCO,
Associate Member

PUBLIC SERVICE

Capital Program Monitoring
Committee, Ad Hoc Fiscal
Committee, Town of San
Anselmo

HONORS AND AWARDS

Anaheim, CA, honoring
contribution to the success of
the Anaheim Resort Project

PRIOR EMPLOYMENT

Founding Principal,
Economic and Planning
Systems, Inc. (EPS)

ABOUT

Richard Berkson, Principal of Berkson Associates, believes that sound policies and strategies require careful consideration of causality, creative problem solving, and incentive-based solutions. His practice is founded on 30+ years of experience providing clear and concise fiscal and financial analysis based on a solid and integrated understanding of fiscal forecasts, local government organization (e.g., formation, annexation, and consolidation), capital improvement policy and programming, and urban economics (demographics, market & financial analysis).

EXPERTISE

Government Organization

Prepares governance feasibility and special studies addressing municipal incorporation, annexations, service reviews and special studies, special district formations, dissolutions and consolidations, and assists in the preparation of intergovernmental agreements including tax sharing. Creates detailed pro forma operational and capital budgets as well as analysis of reorganization issues, options and impacts upon existing agencies, and develops fiscal mitigation measures.

Fiscal and Economic Analysis

Analyzes and predicts fiscal and economic impacts of land uses, developments, and policies on municipal budgets. Designs fiscal models to evaluate public service and financing issues, develops revenue enhancements and mitigation measures for long-term fiscal sustainability. Forecast budgets and develops asset management policies.

Public Finance

Prepares financing strategies and plans for a wide variety of public services and infrastructure projects, including development project-related infrastructure, area-wide capital improvement programs, public safety, and recreation facilities, as well as specific infrastructure projects. Financing techniques applied include formulation of area-specific and facility-specific development impact fees, special tax bonds, sales tax measures, and Infrastructure Financing Districts.

Market and Financial Analysis

Evaluates the feasibility of a range of uses including recreation, residential, office, industrial, retail, and hotel as a part of development proposals, specific and general plans, and governance studies. Prepares initial market reviews and detailed pricing and absorption estimates, demographic forecasting, and development strategies. Constructs pro forma financial analysis of mixed-use projects and individual business proposals. Evaluates financial impacts of public policies.

