



**INVOICE**

**DATE:** July 31, 2019 **INVOICE #:** 19-235-07  
**TO:** Shasta Local Agency Formation Commission (LAFCo)  
**PROJECT:** LAFCo Planning and Staffing Services for **July 2019**

**Staffing Services:**

**Exec Committee / Commission Meetings:** Attended July 10 Executive Committee meeting, Reviewed financials and August 1 Commission Agenda. Preparations for August 1 Commission meeting. This included audit authorization, year-end financials, Shasta CSD Annexation update, and CALAFCO Board nominations.

**Staffing Coordination General Staffing Services.** Met with Fall River Mills CSD Manager Steven Rookledge and Board Member Jerry Monath on July 31 to discuss annexation reviewed in pre-application agreement. Entered into application agreement for compilation of filing annexation materials. Met with Fall River Mills & McArthur FPD Boards in joint special meeting July 31 to discuss consolidation. Providing application materials templates for joint application to LAFCo. Met with CSA Jones Valley representatives and Commissioner July 10 to review water rights transfer.

**Budget Preparations.** Coordinated with Office Manager on year end FY 2018-2019 budget materials and staff report presentation for August 1 Commission meeting, Commission adopted budget included Executive Committee recommended expense reductions and member organization revenue increases.

**FY 2019-20 Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates:**

Recommended Tucker Oaks Water District MSR hearing be closed and re-noticed when District information provided. Started MSR and SOI Updates for CSA #11 – French Gulch; CSA #8 – Palo Cedro; Burney Basin; Pine Grove; and Shasta Mosquito Abatement Districts.

**Applications:**

*Application: Shasta CSD annex, SOI Amendment & CSA Keswick dissolution*  
 Conditions compliance/ Certificate of Completion/ BOE Filing

**July 2019 COSTS** (see attached spreadsheet for hours and expense itemization)

**MSRs and SOI Updates**

Executive Officer	2.0 hrs. @ \$112/hr.	\$ 224.00
GIS Analyst	5.0 hrs. @ \$72/hr.	\$ 360.00
Services Specialist	8.5 hrs. @ \$62/hr.	\$ 527.00

**Staffing Services & Expenses**

Executive Officer	33.5 hrs. @ \$112/hr.	\$ 3,752.00
July 10 Mtg. Mileage 286mi. @ \$0.58/mi.		\$ 165.88

**Shasta CSD annexation completion**

Executive Officer	1.0 hrs. @ \$112/hr.	\$ 112.00
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**TOTAL AMOUNT DUE** **\$ 5,140.88**

Please make check payable to:  
 Planwest Partners, Inc.  
 P.O. Box 4581 Arcata, CA 95518  
 Tax Identification Number: 90-0262382

**Shasta LAFCo Contract Planning Services FY 2018-19 Billing July 2019**

<b>Planwest Partners Inc.</b>		<b>Hours and Expenses</b>											
Task	Account	FY 2018-19 Budget	Principal Planner	Senior Analyst	Assoc/Env Planner	GIS Analyst	Services Specialist	Admin-istrator	Expense	July Total	Total on Budget	Remaining Budget	
Hourly Rate			\$112.00	\$98.00	\$78.00	\$72.00	\$62.00	\$58.00		\$1,111.00	\$1,111.00	\$16,389.00	
<b>MSR/SOI - Review &amp; Analysis</b>			<b>\$17,500.00</b>										
CDFW Fees	52671									\$0.00	\$0.00		
GIS Services	52675					5.00				\$360.00	\$360.00		
Mileage Reimbursement	52676									\$0.00	\$0.00		
Postage Printing	52677									\$0.00	\$0.00		
Public Hearing Notice	52678									\$0.00	\$0.00		
Office Supplies	52679									\$0.00	\$0.00		
Mosquito Abatement/ CSA draft MSRs	52680		2.00				8.50			\$751.00	\$751.00		
<b>Staffing Services Planwest Partners Inc.</b>			<b>\$51,500.00</b>										
General Staffing Services	52006		22.50						\$165.88	\$2,685.88	\$2,685.88		
Policies & Procedures Update-Final	52006									\$0.00	\$0.00		
Staff Coordination	52006		8.00							\$896.00	\$896.00		
Noticing & Staff Reports	52006									\$0.00	\$0.00		
Public Info Requests	52006									\$0.00	\$0.00		
Budget Preparation	52006									\$0.00	\$0.00		
Commission Meetings	52006									\$0.00	\$0.00		
Executive Committee Meetings	52006		3.00							\$336.00	\$336.00		
<b>Application Processing / Pre-app review Expenses- E0</b>			<b>\$0.00</b>										
App Shasta CSD Annex - Keswick		\$5,000.00	1.00							\$112.00	\$112.00	\$4,888.00	
<b>Total Hours</b>			36.50	0.00	0.00	5.00	8.50	0.00					
<b>Total Costs</b>			\$4,088.00	\$0.00	\$0.00	\$360.00	\$527.00	\$0.00	\$165.88	\$5,140.88	\$5,140.88	\$63,971.12	

July 10 meetings mileage 286mi.@ \$0.58/mi \$165.88



## INVOICE

**DATE:** August 31, 2019 **INVOICE #:** 19-235-08  
**TO:** Shasta Local Agency Formation Commission (LAFCo)  
**PROJECT:** LAFCo Planning and Staffing Services for **August 2019**

### **Staffing Services:**

**Exec Committee / Commission Meetings:** Prepared and distributed agenda materials and attended, August 1 Commission meeting. This included audit authorization, year-end financials, Shasta CSD Annexation update, and CALAFCO Board nominations. Received direction from Commission to review CSA#6 Jones Valley MSR based on public comments received at the meeting. Researched water rights allocations.

**Staffing Coordination General Staffing Services.** Reviewed follow-up information on Jones Valley water service and coordinated with Office Manager on staff report for October 3 Commission meeting. Responded to Shasta County on annexation information for Housing Element Update. Provided mapping data as requested. Researched pending legislation for issues affecting LAFCos.

**Budget Preparations.** Started FY 2019-2020 budget expense for reduced staffing.

### **FY 2019-20 Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates:**

Continued MSR and SOI Updates for CSA #11 – French Gulch; CSA #8 – Palo Cedro; Burney Basin; Pine Grove; and Shasta Mosquito Abatement Districts.

### **Applications:**

*Application: Shasta CSD annex, SOI Amendment & CSA Keswick dissolution*

Sent Shasta CSD Service Area Resolution template for conditions compliance. Responded to information requests from County.

*Pre-Application Fall River Valley CSD Annexation Application Preparation:*

Fall River Valley Community Services District (CSD) entered into a pre-application agreement with Shasta LAFCo for assistance on annexation scoping in 2017. Pre-application materials templates and assistance have been provided to the CSD. The CSD now requests LAFCo annexation filing materials preparation assistance by a second pre-application agreement. Application materials prepared based on CSD spreadsheet of parcels proposed for annexation.

*Pre-Application: Fall River Mills & McArthur FPD Consolidation*

Continued communications and pre-application assistance with Fall River Mills & McArthur FPD Boards and staff regarding consolidation. Provided joint LAFCo application materials templates. Reviewed mapping, including potential annexations into Lassen & Modoc Counties. Advised on Plan for Services requirements.

**August 2019 COSTS** (see attached spreadsheet for hours and expense itemization)

**MSRs and SOI Updates**

Executive Officer	4.0 hrs. @ \$112/hr.	\$ 448.00
GIS Analyst	6.0 hrs. @ \$72/hr.	\$ 432.00
Services Specialist	7.5 hrs. @ \$62/hr.	\$ 465.00

**Staffing Services & Expenses**

Executive Officer	17.5 hrs. @ \$112/hr.	\$ 1,960.00
Services Specialist	12.0 hrs. @ \$62/hr.	\$ 744.00
August 1 Mtg. Mileage 286mi.	@ \$0.58/mi.	\$ 165.88

**Shasta CSD annexation completion**

Executive Officer	1.0 hrs. @ \$112/hr.	\$ 112.00
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**Pre-Application: Fall River Valley CSD Annexation Application Preparation**

Services Specialist	20.0 hrs. @ \$62/hr.	\$ 1,240.00
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**Pre-Application: Fall River Mills & McArthur FPD Consolidation**

Executive Officer	3.0 hrs. @ \$112/hr.	\$ 336.00
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**TOTAL AMOUNT DUE** \$ 5,902.88

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Planwest Partners, Inc.  
P.O. Box 4581 Arcata, CA 95518

Tax Identification Number: 90-0262382

**Shasta LAFCo Contract Planning Services FY 2018-19 Billing August 2019**

Planwest Partners Inc.		Hours and Expenses										Total on Budget		Remaining Budget
Task	Account	FY 2019-20 Budget	July	Principal Planner	Senior Analyst	Assoc Planner	GIS Analyst	Services Specialist	Admin-istrator	Expense	August Total	Total on Budget	Remaining Budget	
	Hourly Rate													
<b>MSR/SOI - Review &amp; Analysis</b>		<b>\$17,500.00</b>	<b>\$1,111.00</b>								<b>\$1,345.00</b>	<b>\$2,456.00</b>	<b>\$15,044.00</b>	
CDFW Fees	52671		\$0.00								\$0.00	\$0.00		
GIS Services	52675		\$360.00								\$0.00	\$360.00		
Mileage Reimbursement	52676		\$0.00								\$0.00	\$0.00		
Postage Printing	52677		\$0.00								\$0.00	\$0.00		
Public Hearing Notice	52678		\$0.00								\$0.00	\$0.00		
Office Supplies	52679		\$0.00								\$0.00	\$0.00		
Mosquito Abatement/ CSA draft MSRs	52680		\$751.00	4.00			6.00	7.50			\$1,345.00	\$2,096.00		
<b>Staffing Services Planwest Partners Inc.</b>		<b>\$51,500.00</b>	<b>\$3,917.88</b>								<b>\$2,869.88</b>	<b>\$6,787.76</b>	<b>\$44,712.24</b>	
General Staffing Services	52006		\$2,685.88	6.00				12.00			\$1,416.00	\$4,101.88		
Policies & Procedures Update-Final	52006		\$0.00								\$0.00	\$0.00		
Staff Coordination	52006		\$896.00	7.50							\$840.00	\$1,736.00		
Noticing & Staff Reports	52006		\$0.00								\$0.00	\$0.00		
Public Info Requests	52006		\$0.00								\$0.00	\$0.00		
Budget Preparation	52006		\$0.00								\$0.00	\$0.00		
Commission Meetings	52006		\$0.00	4.00						\$165.88	\$613.88	\$613.88		
Executive Committee Meetings	52006		\$336.00								\$0.00	\$336.00		
<b>Application Processing /Pre-app review Expenses- EO</b>			<b>\$112.00</b>								<b>\$112.00</b>	<b>\$9,861.50</b>		
App Shasta CSD Annex - Keswick		\$5,000.00	\$112.00	1.00							\$112.00	\$8,621.50	-\$3,621.50	
Pre-App - McArthur-FRM FPD Consol				3.00							\$336.00		\$0.00	
Pre-App Fall R. Valley CSD Annex App		\$1,800.00						20.00			\$1,240.00	\$1,240.00	\$560.00	
<b>Total Hours</b>				<b>\$2,856.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$432.00</b>	<b>\$2,449.00</b>	<b>\$0.00</b>	<b>\$165.88</b>		<b>\$19,105.26</b>	<b>\$59,756.24</b>	
<b>Total Costs</b>			<b>\$5,140.88</b>											

Aug 1 meetings mileage 286mi.@ \$0.58/mi \$165.88

cross check

\$5,902.88



INVOICE

DATE: September 30, 2019 INVOICE #: 19-235-09

TO: Shasta Local Agency Formation Commission (LAFCo)

PROJECT: LAFCo Planning and Staffing Services for September 2019

Staffing Services:

Exec Committee / Commission Meetings: Attended, September 26 Executive Committee meeting. Received direction from Executive Committee to research other special district options for CSA#6 Jones Valley MSR based on public comments received at the meeting. Reviewed draft October 3 Commission agenda & determined no pressing items, Committee cancelled meeting.

Staffing Coordination General Staffing Services. Coordinated with Office Manager on October 3 draft Commission meeting agenda for Executive Committee review.

FY 2019-20 Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates:

Continued MSR and SOI Updates for CSA #11 – French Gulch; CSA #8 – Palo Cedro; Burney Basin; Pine Grove; and Shasta Mosquito Abatement Districts.

Applications:

Application: Shasta CSD annex, SOI Amendment & CSA Keswick dissolution
County staff forwarded signed property tax transfer resolution.

Pre-Application Fall River Valley CSD Annexation Application Preparation:

Application materials prepared based on CSD spreadsheet of parcels proposed for annexation.

Pre-Application: Fall River Mills & McArthur FPD Consolidation

Attended McArthur FPD Board meeting September 25. Meeting also attended by Fall River Mills FPD representatives. Had conversation with Fall River Mills FPD Chief. Reviewed filing materials and LAFCo procedures. Advised on asset transfer. Updated consolidation mapping.

September 2019 COSTS (see attached spreadsheet for hours and expense itemization)

MSRs and SOI Updates

Table with 3 columns: Role, Hours, and Amount. Rows include Executive Officer, GIS Analyst, and Services Specialist.

Staffing Services & Expenses

Table with 3 columns: Role, Hours, and Amount. Rows include Executive Officer and Sept 26 Exec Comm Mtg. Mileage.

Pre-Application: Fall River Valley CSD Annexation Application Preparation

Table with 3 columns: Role, Hours, and Amount. Row includes Services Specialist.

Pre-Application: Fall River Mills & McArthur FPD Consolidation

Table with 3 columns: Role, Hours, and Amount. Rows include Executive Officer and GIS Analyst.

TOTAL AMOUNT DUE \$5,424.88

Please make check payable to: Planwest Partners, Inc. P.O. Box 4581 Arcata, CA 95518 Tax Identification Number: 90-0262382

**Shasta LAFCo Contract Planning Services FY 2019-2020 Billing      September 2019**

Planwest Partners Inc.		Hours and Expenses										Total on Budget	Remaining Budget	
Task	Account	FY 2019-20 Budget	July	August	Principal Planner	Senior Analyst	Assoc Planner	GIS Analyst	Services Specialist	Admini- strator	Expense	August Total	Total on Budget	Remaining Budget
Hourly Rate														
<b>MSR/SOI - Review &amp; Analysis</b>		<b>\$17,500.00</b>	<b>\$1,111.00</b>	<b>\$1,345.00</b>								<b>\$1,310.00</b>	<b>\$3,766.00</b>	<b>\$13,734.00</b>
CDFW Fees	52671		\$0.00	\$0.00								\$0.00	\$0.00	
GIS Services	52675		\$360.00	\$0.00			3.00					\$216.00	\$576.00	
Mileage Reimbursement	52676		\$0.00	\$0.00								\$0.00	\$0.00	
Postage Printing	52677		\$0.00	\$0.00								\$0.00	\$0.00	
Public Hearing Notice	52678		\$0.00	\$0.00								\$0.00	\$0.00	
Office Supplies	52679		\$0.00	\$0.00								\$0.00	\$0.00	
Mosquito Abatement/ CSA draft MSRs	52680		\$751.00	\$1,345.00	7.00				5.00			\$1,094.00	\$3,190.00	
<b>Staffing Services Planwest Partners Inc.</b>		<b>\$51,500.00</b>	<b>\$3,917.88</b>	<b>\$2,869.88</b>								<b>\$3,245.88</b>	<b>\$10,033.64</b>	<b>\$41,466.36</b>
General Staffing Services	52006		\$2,685.88	\$1,416.00	14.00							\$1,568.00	\$5,669.88	
Policies & Procedures Update-Final	52006		\$0.00	\$0.00								\$0.00	\$0.00	
Staff Coordination	52006		\$896.00	\$840.00	7.50							\$840.00	\$2,576.00	
Noticing & Staff Reports	52006		\$0.00	\$0.00								\$0.00	\$0.00	
Public Info Requests	52006		\$0.00	\$0.00								\$0.00	\$0.00	
Budget Preparation	52006		\$0.00	\$0.00								\$0.00	\$0.00	
Commission Meetings	52006		\$0.00	\$613.88								\$0.00	\$613.88	
Executive Committee Meetings	52006		\$336.00	\$0.00	6.00						\$165.88	\$837.88	\$1,173.88	
<b>Application Processing /Pre-app review Expenses- EO</b>			<b>\$112.00</b>	<b>\$1,688.00</b>								<b>\$0.00</b>	<b>\$10,066.50</b>	
App Shasta CSD Annex - Keswick		\$5,000.00	\$112.00	\$112.00								\$0.00	\$8,733.50	-\$3,733.50
Pre-App - McArthur-FRM FPD Consol				\$336.00	5.00		3.00					\$776.00	\$1,333.00	\$0.00
Pre-App Fall R. Valley CSD Annex App		\$1,800.00		\$1,240.00					1.50			\$93.00	\$1,333.00	\$467.00
<b>Total Hours</b>					39.50	0.00	0.00	0.00	6.00	0.00		\$93.00	\$1,333.00	\$467.00
<b>Total Costs</b>			<b>\$5,140.88</b>	<b>\$5,902.88</b>	<b>\$4,424.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$432.00</b>	<b>\$403.00</b>	<b>\$0.00</b>	<b>\$165.88</b>	<b>\$5,424.88</b>	<b>\$23,866.14</b>	<b>\$55,200.36</b>

Sept 26 meetings mileage 286mi.@ \$0.58/mi \$165.88

cross check

\$5,424.88



INVOICE

DATE: October 31, 2019 INVOICE #: 19-235-10

TO: Shasta Local Agency Formation Commission (LAFCo)

PROJECT: LAFCo Planning and Staffing Services for October 2019

Staffing Services:

Exec Committee / Commission Meetings: no meetings this period.

Staffing Coordination General Staffing Services. Responded to State Water Resources Control Board staff to participate in discussions on potential small water systems consolidations in the Lakehead area. Water Board outreach attracted CSA Sugarloaf residents. Participated in State/County/LAFCo conference call to discuss conditions and potential consolidations. Responded to Shasta County Grand Jury request for interview. Responded to California Special Districts Association Database and Online Communities Coordinator request for changes to special districts in past year. Received inquiry from Office of State Controller Local Government Programs and Services Division on status of Fall River Valley Irrigation District which is on the SB 448 Inactive List for special districts.

FY 2019-20 Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates:

Continued MSR and SOI Updates for CSA #11 – French Gulch; CSA #8 – Palo Cedro; Burney Basin; Pine Grove; and Shasta Mosquito Abatement Districts. Additional info requests made.

Applications:

Application: Shasta CSD annex, SOI Amendment & CSA Keswick dissolution

Reviewed asset transfer documents scheduled for Board of Supervisors review & action. Provided updated condition compliance checklist for Certification of Completion.

Pre-Application: Fall River Mills & McArthur FPD Consolidation

As follow-up to September meetings, advised of additional meeting held with CalFIRE/Shasta Co. Fire and McArthur FPD regarding possible expanded merger, to potentially include Soldier Mountain station. Received Fall River Mills & McArthur FPD resolutions of application.

October 2019 COSTS (see attached spreadsheet for hours and expense itemization)

MSRs and SOI Updates

Table with 3 columns: Role, Hours, and Amount. Rows include Executive Officer, GIS Analyst, and Services Specialist.

Staffing Services

Table with 3 columns: Role, Hours, and Amount. Row includes Executive Officer.

Application: Shasta CSD annex, SOI Amendment & CSA Keswick dissolution

Table with 3 columns: Role, Hours, and Amount. Row includes Executive Officer.

Pre-Application: Fall River Valley CSD Annexation Application Preparation

Table with 3 columns: Role, Hours, and Amount. Row includes Executive Officer.

TOTAL AMOUNT DUE \$ 4,442.00

Please make check payable to:

Planwest Partners, Inc.
P.O. Box 4581 Arcata, CA 95518

Tax Identification Number: 90-0262382



**Shasta LAFCo Contract Planning Services FY 2019-2020 Billing      October 2019**

Task	Hourly Rate	FY 2019-20 Budget		Hours and Expenses												Total on Budget	Remaining Budget		
		Account	Budget	July	August	Sept.	Principal Planner	Senior Analyst	Assoc Planner	GIS Analyst	Services Specialist	Admin-istrator	Expense	October Total					
<b>MSR/SOI - Review &amp; Analysis</b>			<b>\$17,500.00</b>	<b>\$1,111.00</b>	<b>\$1,345.00</b>	<b>\$1,310.00</b>												<b>\$5,128.00</b>	<b>\$12,372.00</b>
CDFW Fees		52671		\$0.00	\$0.00	\$0.00												\$0.00	
GIS Services		52675		\$360.00	\$0.00	\$216.00												\$1,764.00	
Mileage Reimbursement		52676		\$0.00	\$0.00	\$0.00												\$0.00	
Postage Printing		52677		\$0.00	\$0.00	\$0.00												\$0.00	
Public Hearing Notice		52678		\$0.00	\$0.00	\$0.00												\$0.00	
Office Supplies		52679		\$0.00	\$0.00	\$0.00												\$0.00	
Mosquito Abatement/ CSA draft MSRs		52680		\$751.00	\$1,345.00	\$1,094.00	1.00									1.00		\$3,364.00	
<b>Staffing Services Planwest Partners Inc.</b>			<b>\$51,500.00</b>	<b>\$3,917.88</b>	<b>\$2,869.88</b>	<b>\$3,245.88</b>												<b>\$12,665.64</b>	<b>\$38,834.36</b>
General Staffing Services		52006		\$2,685.88	\$1,416.00	\$1,568.00	14.50											\$7,293.88	
Policies & Procedures Update-Final		52006		\$0.00	\$0.00	\$0.00												\$0.00	
Staff Coordination		52006		\$896.00	\$840.00	\$840.00	9.00											\$3,584.00	
Noticing & Staff Reports		52006		\$0.00	\$0.00	\$0.00												\$0.00	
Public Info Requests		52006		\$0.00	\$0.00	\$0.00												\$0.00	
Budget Preparation		52006		\$0.00	\$0.00	\$0.00												\$0.00	
Commission Meetings		52006		\$0.00	\$613.88	\$0.00												\$613.88	
Executive Committee Meetings		52006		\$336.00	\$0.00	\$837.88												\$1,173.88	
<b>Application Processing / Pre-app review Expenses- EO</b>				<b>\$112.00</b>	<b>\$1,688.00</b>	<b>\$869.00</b>												<b>\$11,514.50</b>	
App Shasta CSD Annex - Keswick			\$5,000.00	\$112.00	\$112.00	\$0.00	1.00											\$8,733.50	-\$3,733.50
Pre-App - McArthur-FRM FPD Consol					\$336.00	\$776.00	3.00											\$1,448.00	-\$1,448.00
Pre-App Fall R. Valley CSD Annex App			\$1,800.00		\$1,240.00	\$93.00												\$1,333.00	\$467.00
<b>Total Hours</b>							28.50	0.00	0.00	0.00	16.50	1.00	0.00						
<b>Total Costs</b>				<b>\$5,140.88</b>	<b>\$5,902.88</b>	<b>\$5,424.88</b>	<b>\$3,192.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,188.00</b>	<b>\$62.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$4,442.00</b>	<b>\$29,308.14</b>		<b>\$51,206.36</b>	

cross check \$4,442.00