



**INVOICE**

**DATE:** May 31, 2019 **INVOICE #:** 19-235-05  
**TO:** Shasta Local Agency Formation Commission (LAFCo)  
**PROJECT:** LAFCo Planning and Staffing Services for **May 2019**

**Staffing Services:**

**Exec Committee / Commission Meetings:** Prepared Materials, for June 6 Commission meeting. Agenda items; Commission PERS liability issues options staff report, three Water Districts MSR & SOI Updates. Prepared Exec Officer contract extension and reviewed general counsel contract extension for FY 2019-20. Attended May 22 Executive Committee at new office location.

**Staffing Coordination General Staffing Services:** Met with Executive Committee May 22 Coordinated with office manager on June 6 Commission meeting packet materials. Communicated with legal counsel on retained PERL counsel Best Best & Krieger progress addressing CalPERS unfunded liability determination.

**Budget Preparations.** Coordinated with Office Manager on budget materials and staff report for June 6 Commission meeting staff report, outlining FY 2019-2020 Budget issues including Executive Committee recommended expense reductions and revenue increases.

**FY 2018-19 Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates:** Prepared and distributed Draft MSR & SOI Update for Bella Vista; Burney; and Cottonwood; Water Districts for June 6 public hearing. Reviewed resolution for MSR & SOI Update action by the Commission. Tucker Oaks Water District MSR to be continued.

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

**MSRs and SOI Updates**

Executive Officer	9.0 hrs. @ \$112/hr.	\$ 1,008.00
GIS Analyst	6.00 hrs. @ \$62/hr.	\$ 372.00
Services Specialist	28.5 hrs. @ \$62/hr.	\$ 1,767.00

**Staffing Services & Expenses**

Executive Officer	44.50 hrs. @ \$112/hr.	\$ 4,984.00
Senior Analyst	0.5 hrs. @ \$92/hr.	\$ 46.00
UPS Expense		\$ 24.82
April 17 Mtg. Mileage 286mi. @ \$0.58/mi.		\$ 165.88

**TOTAL AMOUNT DUE \$ 8,367.70**

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 May 2019**

<b>Planwest Partners Inc.</b>		<b>Hours and Expenses</b>											<b>Remaining Budget</b>	
<b>Task</b>	<b>Account</b>	<b>FY 2018-19 Budget</b>	<b>Principal Planner</b>	<b>Senior Analyst</b>	<b>Associate Planner/Environ</b>	<b>GIS Analyst</b>	<b>Facilitator/Outreach</b>	<b>Services Specialist</b>	<b>Admini-strator</b>	<b>Services Assistant</b>	<b>Exp.</b>	<b>May Total</b>	<b>Total on Budget</b>	<b>Remaining Budget</b>
<b>Hourly Rate</b>		<b>\$25,000.00</b>											<b>\$21,718.50</b>	<b>\$3,281.50</b>
<b>MSR/SOI - Review &amp; Analysis</b>														
CDFW Fees	52671								\$58.00	\$42.00		\$0.00	\$0.00	\$0.00
GIS Services	52675				6.00							\$372.00	\$1,116.00	
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	
Draft MSRs - Water District MSRs	52680		9.00					28.50				\$2,775.00	\$5,002.00	
Draft MSRs - Cemetery- MSR	52680											\$0.00	\$15,600.50	
<b>Staffing Services Planwest Partners Inc.</b>		<b>\$61,500.00</b>										<b>\$5,220.70</b>	<b>\$43,797.48</b>	<b>\$17,702.52</b>
General Staffing Services	52006		30.50	0.5								\$3,462.00	\$17,168.28	
Policies & Procedures Update-Final	52006											\$0.00	\$0.00	
Staff Coordination	52006		7.50							\$24.82		\$864.82	\$9,733.32	
Noticing & Staff Reports	52006											\$0.00	\$7,661.00	
Public Info Requests	52006											\$0.00	\$1,224.00	
Budget Preparation	52006		2.00									\$224.00	\$1,232.00	
Commission Meetings	52006											\$0.00	\$3,213.37	
Executive Committee Meetings	52006		4.50								\$165.88	\$669.88	\$3,565.51	
<b>Staffing Services Supplies</b>		<b>\$0.00</b>										<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Application Processing /Pre-app review Expenses- EO</b>														
Pre-App - Tierra Robles CSD Formation		\$2,500.00										\$0.00	\$672.00	\$1,828.00
App Shasta CSD SOI-Annex & Keswick CSA Dissolution		\$5,700.00										\$0.00	\$8,509.50	-\$2,809.50
App Stevens Ridge Annex to Cottonwood		\$1,800.00										\$0.00	\$2,903.50	-\$1,103.50
<b>Application Processing Supplies</b>		<b>\$0.00</b>										<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total Hours</b>			53.50	0.50	0.00	6.00	0.00	28.50	0.00	0.00				
<b>Total Costs</b>			\$5,992.00	\$46.00	\$0.00	\$372.00	\$0.00	\$1,767.00	\$0.00	\$0.00	\$190.70	\$8,367.70	\$77,600.98	\$20,984.02

<b>Monthly Expenses</b>	<b>Expense</b>
Exec Comm Mtg Miles May 22 286mi.@ \$0.58/mi.	\$165.88
UPS Charge to return East Street office keys & fob	\$24.82
<b>Monthly Expense Total</b>	<b>\$190.70</b>



**Shipped from:**

PLANWEST  
GEORGE WILLIAMSON  
1125 16TH ST STE 200  
ARCATA, CA 95521-5585

**Delivery Service Invoice**

Invoice Date **May 11, 2019**  
Invoice Number 00004YY107199  
Shipper Number 4YY107  
Control ID 99W1  
Page 1 of 3



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AB 01 008597 37389 H 23 A



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**Account Status Summary**  
**Weekly Payment Plan**

Charges This Period	\$ 24.82
Amount Outstanding (prior invoices)	\$ 0.00
Total Amount Outstanding	\$ 24.82

**Rate Change Information**

Effective May 20, 2019, the International Air-Export Fuel Surcharge will increase by 0.5% for all thresholds. For additional information, visit [www.rates.ups.com](http://www.rates.ups.com).

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**Summary of Charges**

Page	Charge
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<b>Charges this period \$ 24.82</b>	

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OFFICE KEYS/FOR  
RETURN

**Delivery Service Invoice**

Invoice Date **May 11, 2019**  
Invoice Number 00004YY107199  
Shipper Number 4YY107

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**Outbound**  
**UPS Shipping Document**

Pickup Date	Tracking Number	Service	ZIP Code	Zone	Weight	Billed Charge
05/07	F0669910585	2nd Day Air Commercial	96001	202	8	22.98
						Fuel Surcharge 1.84
<b>Total</b>						<b>24.82</b>

Sender : GEORGE WILLIAMSON  
PLAN WEST PARTNERS  
CA 95501

Receiver: KATHY BULL  
SHASTA LAFCO  
REDDING CA 96001

Total UPS Shipping Document	1 Package(s)	24.82
Total Outbound	1 Package(s)	24.82



INVOICE

DATE: June 30, 2019 INVOICE #: 19-235-06
TO: Shasta Local Agency Formation Commission (LAFCo)
PROJECT: LAFCo Planning and Staffing Services for June 2019

Staffing Services:

Exec Committee / Commission Meetings: Attended June 6 Commission meeting.

Staffing Coordination General Staffing Services. Responded to County inquiry regarding annexation effects on Regional Housing Needs Allocation. Commented on County policy regarding RHN Allocations based on boundary changes.

Budget Preparations. Coordinated with Office Manager on FY 2019-2020 budget materials and staff report presentation for June 6 Commission meeting, Commission accepted Executive Committee recommended expense reductions and revenue increases.

FY 2018-19 Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates: Presented Bella Vista; Burney; and Cottonwood; Water Districts MSR & SOI Update at June 6 public hearing. Provided staff report and resolution for Commission consideration. Tucker Oaks Water District MSR was continued. Based on Commission comments at hearing, followed up with Bella Vista General Manager on "Table 3: Supply and Demand Projections" noting that the District has more than adequate supply in non-shortage years, but vulnerable to CVP supply cutbacks in shortage years. Adding Table footnote acknowledging District is subject to severe supply curtailment pursuant to CVP Municipal and Industrial Water Shortage Policy Guidelines and Procedures. Water supply reliability analysis and shortage impacts detailed in District's Urban Water Management Plan.

Tierra Robles CSD Formation - Pre-Application review

Received hearing materials from the Shasta County, for Planning Commission review of Tierra Robles Planned Development application. Materials reviewed included Final EIR with response to comments and support information. Received public record documents request on behalf of Protect Against Tierra Robles Overdeveloped Lands (PATROL).

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

MSRs and SOI Updates

Executive Officer 5.0 hrs. @ \$112/hr. \$ 560.00

Staffing Services & Expenses

Executive Officer 22.5 hrs. @ \$112/hr. \$ 2,520.00
June 6 Mtg. Mileage 286mi. @ \$0.58/mi. \$ 165.88

Tierra Robles CSD Formation - Pre-Application review

Executive Officer 2.0 hrs. @ \$112/hr. \$ 224.00

TOTAL AMOUNT DUE \$ 3,469.88

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Tax Identification Number: 90-0262382

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

<b>Planwest Partners Inc.</b>		<b>Hours and Expenses</b>											<b>Total on Budget</b>	<b>Remaining Budget</b>
<b>Task</b>	<b>Account</b>	<b>FY 2018-19 Budget</b>	<b>Principal Planner</b>	<b>Senior Analyst</b>	<b>Assoc/ Environ Planner</b>	<b>GIS Analyst</b>	<b>Facilitator/ Outreach</b>	<b>Services Specialist</b>	<b>Admini- strator</b>	<b>Services Assistant</b>	<b>Exp.</b>	<b>June Total</b>		
<b>MSR/SOI - Review &amp; Analysis</b>		<b>\$25,000.00</b>												
CDFW Fees	52671											\$0.00	\$0.00	\$0.00
GIS Services	52675											\$0.00	\$1,116.00	\$1,116.00
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
Draft MSRs - Water District MSRs	52680		5.00									\$560.00	\$5,562.00	\$5,562.00
Draft MSRs - Cemetery- MSR	52680											\$0.00	\$15,600.50	\$15,600.50
<b>Staffing Services Planwest Partners Inc.</b>		<b>\$61,500.00</b>												
General Staffing Services	52006		10.50									\$1,176.00	\$18,344.28	\$18,344.28
Policies & Procedures Update-Final	52006											\$0.00	\$0.00	\$0.00
Staff Coordination	52006		6.00								\$0.00	\$672.00	\$10,405.32	\$10,405.32
Noticing & Staff Reports	52006											\$0.00	\$7,661.00	\$7,661.00
Public Info Requests	52006											\$0.00	\$1,224.00	\$1,224.00
Budget Preparation	52006											\$0.00	\$1,232.00	\$1,232.00
Commission Meetings	52006		6.00								\$165.88	\$837.88	\$4,051.25	\$4,051.25
Executive Committee Meetings	52006											\$0.00	\$3,565.51	\$3,565.51
<b>Staffing Services Supplies</b>		<b>\$0.00</b>											\$0.00	\$0.00
<b>Application Processing / Pre-app review Expenses- EO</b>														
Pre-App - Tierra Robles CSD Formation		\$2,500.00	2.00									\$224.00	\$896.00	\$1,604.00
App Shasta CSD SOI-Annex & Keswick CSA Dissolution		\$5,700.00										\$0.00	\$8,509.50	-\$2,809.50
App Stevens Ridge Annex to Cottonwood		\$1,800.00										\$0.00	\$2,903.50	-\$1,103.50
<b>Application Processing Supplies</b>		<b>\$0.00</b>											\$0.00	\$0.00
<b>Total Hours</b>			29.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
<b>Total Costs</b>			\$3,304.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$165.88	\$3,469.88	\$81,070.86	\$17,738.14

<b>Monthly Expenses</b>	<b>Expense</b>
Exec Comm Mtg Miles June 6 286mi.@ \$0.58/mi.	\$165.88
<b>Monthly Expense Total</b>	<b>\$165.88</b>