



## INVOICE

**DATE:** January 31, 2017 **INVOICE #:** 17-235-01  
**TO:** Shasta Local Agency Formation Commission (LAFCo)  
**PROJECT:** LAFCo Planning and Staffing Services for **JANUARY 2017**

### **Staffing Services:**

**Exec Committee / Commission Meetings:** Phoned in for January 19 Executive Committee Meeting. Reviewed February 2 commission meeting agenda.

**Fiscal Committee / Budget:** Phoned in for January 18 Fiscal Committee Meeting, rescheduled so all members could attend. Phoned in for January 25 Fiscal Committee Meeting, reviewed financial reports and quarter 2 budget report. Received additional call from committee member.

**Staffing Coordination:** Reviewed December Commission meeting Minutes; Fiscal Information – November /December bank statements, reconciliations, disbursements; and 2nd Quarter Budget Information/ mid-year budget review prepared by Manager for February 2 commission packet. Manager reported on CalPers letter regarding staffing and financial review. GIS Analyst researched CSD boundary files in response to inquiry on potential discrepancies.

**General Staffing Services:** Corresponded with Redding City staff on Sphere of Influence (SOI) Resolution scheduled for February meeting. Updated staff report and reviewed request from representative of property owner outside the SOI to present information at the February commission meeting. Prepared and distributed Chapter 1 & 2 policy updates for February 2 2017 commission review. Format also being updated for all policies. Prepared staff report for updated Commissioner Terms of Office. Prepared Exec Officer Performance Review form, staff report and self-evaluation form for distribution at the February 2 meeting. Prepared Status of Future Proposals/Pre-Application Agreements staff report. Received request for information from City of Anderson staff on potential services extension proposal outside City boundaries. Advised City planner on LAFCO application procedures. Received inquiry on how and where to file JPA's regarding municipal services in Shasta County prompted by new Senate Bill 1266 that went into effect, requiring JPA's to file with each county's LAFCo. Researched and prepared Commission staff report. Sent County staff CALAFCO White Paper: Sustainable Groundwater Management Act LAFCOs.

**Municipal Service Reviews (MSR) and Sphere of Influence (SOI) Updates for FY 2016-17:** Continued preparation of five County Service Area (CSA's 2-Sugarloaf; 3 Castella; 6-Jones Valley; 13-Alpine Meadows; and 17 Cottonwood) MSR/ SOI Updates. Sent admin drafts of CSA-3 Castella; 6-Jones Valley; 13-Alpine Meadows MSR/ SOI Update to County staff for review. Updated parcel data and other resource coverages on CSA boundary maps.

**Pre-App-Tierra Robles Subdivision Proposed CSD -** Researched and responded to County staff inquiry on proposal that CSD both own the open space parcels and maintain Conservation Easements on private parcels to implement environment protection measures for project.

**Pre-app - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation –** Received notice that resolutions of applications being passed by both cemetery district boards. Reviewed application filing requirements in anticipation of resolutions submittal.

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**JANUARY 2017 COSTS** *(see attached spreadsheet for hours and expense itemization)*

**Staffing Services & Expenses**

Executive Officer	32.0 hrs @ \$108/hr.	\$ 3,456.00
GIS Analyst	2.25 hrs @ \$62/hr.	\$ 139.50
Services Assistant	43.0 hrs @ \$40/hr.	\$ 1,720.00

**MSRs and SOI Updates for FY 2016-17**

GIS Analyst	4.0 hrs @ \$62/hr.	\$ 248.00
Services Assistant	29.0 hrs @ \$40/hr.	\$ 1,160.00

**Pre-App-Tierra Robles Subdivision Proposed CSD**

Executive Officer	1.0 hrs @ \$108/hr.	\$ 108.00
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**Pre-app - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation**

Executive Officer	1.5 hrs @ \$108/hr.	\$ 162.00
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<b>TOTAL AMOUNT DUE</b>		<b>\$ 6,993.50</b>
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Please make check payable to: Planwest Partners, Inc. P.O. Box 4581 Arcata, CA 95518  
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**Shasta LAFCo Contract Planning Services FY 2016-17 Billing JANUARY 2017**

Planwest Partners Inc.		Hours and Expenses										Remaining Budget		
Task	Account	FY 2016-17 Budget	Nov.	Dec.	Executive Officer	Analyst	GIS Analyst	Service Specialist	Admini- strator	Services Assistant	Expense	January Total	Total on Budget	Remaining Budget
Hourly Rate														
<b>MSR/SOI - Review &amp; Analysis (see Note 1 below)</b>		<b>\$10,000.00</b>	<b>\$1,795.00</b>	<b>\$395.00</b>								<b>\$1,408.00</b>	<b>\$9,174.00</b>	<b>\$826.00</b>
CDFW Fees	52671	\$0.00										\$0.00	\$0.00	\$0.00
GIS Services	52675	\$1,050.00					4.00					\$248.00	\$248.00	\$802.00
Mileage Reimbursement	52676	\$0.00										\$0.00	\$0.00	\$0.00
Postage Printing	52677	\$200.00										\$0.00	\$0.00	\$200.00
Public Hearing Notice	52678	\$250.00										\$0.00	\$0.00	\$250.00
Office Supplies	52679	\$0.00										\$0.00	\$0.00	\$0.00
Municipal Services Review Preparations	52680	\$8,500.00								29.00		\$1,160.00	\$1,160.00	\$7,340.00
<b>Staffing Services Planwest Partners Inc. (see Note 2)</b>		<b>\$60,000.00</b>	<b>\$4,190.44</b>	<b>\$4,878.44</b>								<b>\$5,315.50</b>	<b>\$30,533.74</b>	<b>\$29,466.26</b>
General Staffing Services	52006				7.00		2.25			14.00		\$1,455.50	\$1,455.50	
Policies & Procedures Update-Chapters 1 & 2	52006				5.50					28.00		\$1,714.00	\$1,714.00	
Staff Coordination	52006				5.00					1.00		\$540.00	\$540.00	
Noticing & Staff Reports	52006				8.00							\$904.00	\$904.00	
Response to Public Information Requests	52006				2.00							\$216.00	\$216.00	
Budget Preparation	52006				1.50							\$162.00	\$162.00	
Commission Meetings - prep & attendance	52006				1.00							\$0.00	\$0.00	
Executive Committee Meetings	52006				2.00							\$108.00	\$108.00	
Fiscal Committee Meetings	52006											\$216.00	\$216.00	
<b>Staffing Services Supplies (see Note 3 below)</b>		<b>\$3,655.00</b>	<b>\$0.00</b>	<b>\$0.00</b>								<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,655.00</b>
Mileage Reimbursement	52070	\$240.00										\$0.00	\$0.00	\$240.00
Office Expense	52080	\$740.00										\$0.00	\$0.00	\$740.00
Office Supplies	52100	\$1,500.00										\$0.00	\$0.00	\$1,500.00
Postage and Shipping	52110	\$675.00										\$0.00	\$0.00	\$675.00
Printing	52120	\$500.00										\$0.00	\$0.00	\$500.00
<b>Application Processing /Pre-app expenses (see Note 4 below)</b>														
Shasta CSD Foxwood Annex. #2 (#2014-01B)	52402											\$0.00	\$0.00	
Burney WD Highmark Annex.#2 (#2014-01A)	52402											\$0.00	\$0.00	
Pre-App-W.Ridge/Calle Campo Redding Annex												\$0.00	\$0.00	
<b>Pre-App-Tierra Robles Subdivision Proposed CSD</b>		<b>\$5,000.00</b>	<b>\$162.00</b>	<b>\$0.00</b>	1.00							\$108.00	\$1,295.00	\$3,705.00
Pre-App - Tierra Oaks Redding SOI/Annex												\$0.00	\$0.00	
<b>Pre-app - Proposed Cemetery District Consolidation</b>		<b>\$0.00</b>	<b>\$564.00</b>	<b>\$0.00</b>	1.50							\$162.00	\$726.00	-\$726.00
<b>Total Hours</b>					34.50	0.00	6.25	0.00	0.00	72.00				
<b>Total Costs</b>			<b>\$6,711.44</b>	<b>\$5,273.44</b>	<b>\$3,776.00</b>	<b>\$0.00</b>	<b>\$387.50</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,880.00</b>	<b>\$0.00</b>	<b>\$6,993.50</b>	<b>\$41,728.74</b>	<b>\$36,926.26</b>

Notes 1 & 2: These shaded rows provides budget amount & expenses summary for accounts, all itemized expenses below are summed up in this shaded row.  
 Note 3 budgeted expenses specifically for Staffing Services Supplies routinely incurred at Redding Office only charged in special circumstances and explained on invoice  
 Note 4 Charges only for Application Processing with filed application or Pre-app review expenses with signed agreement

Monthly Expenses	Expense
January (0 trip) Miles: 286 @ \$0.535/mile	\$0.00
<b>Monthly Expense Total</b>	<b>\$0.00</b>



## INVOICE

**DATE:** February 28, 2017 **INVOICE #:** 17-235-02  
**TO:** Shasta Local Agency Formation Commission (LAFCo)  
**PROJECT:** LAFCo Planning and Staffing Services for **FEBRUARY 2017**

### **Staffing Services:**

**Exec Committee / Commission Meetings:** Coordinated with Manager on March 1 Executive Committee agenda. Reviewed FY 2017-18 MSR SOI Update Schedule and developed alternate list of MSR SOI Updates for Executive Committee consideration. Attended and presented staff reports and agenda items at February 2 commission meeting. Started preparations for April 6 commission meeting agenda packet.

**Budget:** Started proposed FY 2017-18 Budget preparations for hearing on April 6. Coordinated with Manager on Proposed FY 2016-17 Budget amendment.

**Staffing Coordination:** Coordinated with manager following February 2 commission meeting on staffing tasks, including preparation and distribution of special district alternate ballots and noticing, which defined election rules and submittal date of April 3. Reviewed Board of Equalization acknowledgement for Deschutes Reorganization – City of Anderson. Provided input on letter CalPERS Board for waiver, per Government Code Section 20537 relating to payments, to allow one-time payment by check at the start of each fiscal year, rather than setting up requested electronic fund transfer and incurring fees.

**General Staffing Services:** Started update of Policy Chapter 3 for Commission review at April 6 meeting, Made Chapter 1 & 2 policy revisions based on commission review and input received February 2 2017. Format being updated for all policies. Responded to speaker request for incoming Shasta County (Civil) Grand Jury. Responded to property owner request for information related to an out of area services request, for lands within a Sphere of Influence. Reviewed list of Resolutions for Previously Approved MSR/SOI update; Budget Line Items Adjustment for FY 2016-17; and authorization to Transfer Funds from Operational to Savings Account.

**Municipal Service Reviews (MSR) and Sphere of Influence (SOI) Updates for FY 2016-17:** Prepared and distributed to Shasta County Public Works five County Service Area (CSA's 2-Sugarloaf; 3 Castella; 6-Jones Valley; 13-Alpine Meadows; and 17 Cottonwood) MSR/ SOI Updates. County to conduct community outreach. CSAs to be scheduled for hearing on April 6. Analyzed Anderson Sphere of Influence for resource lands not requiring services.

**Pre-App-Tierra Robles Subdivision Proposed CSD –** Reviewed updated project description, design guidelines and phasing maps provided by County staff and responded to County request for information on potential services provided by proposed CSD including recognition that: having private open space and resource management areas (RMAs) on private parcel would result in more privately owned land for the proposed CSD to manage. Acknowledged receipt and review of Oak Management Plan, which includes vegetation and fuels management for RMAs. Noted that, it appears the district would also be responsible for maintaining certain drainages on private property, and controlling human uses that could cause erosion.

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**Pre-app - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation –**  
 Reviewed resolution of application received from Pine Grove cemetery district boards. Received signed pre-application agreement and began preparation of consolidation analysis and findings.

**FEBRUARY 2017 COSTS** *(see attached spreadsheet for hours and expense itemization)*

**Staffing Services & Expenses**

Executive Officer	40.0 hrs @ \$108/hr.	\$ 4,320.00
Senior Analyst	1.0 hrs @ \$88/hr.	\$ 88.00
GIS Analyst	2.75 hrs @ \$62/hr.	\$ 170.50
Services Assistant	15.5 hrs @ \$40/hr.	\$ 620.00
Mileage 338 @ \$0.535/mi		\$ 180.83

**MSRs and SOI Updates for FY 2016-17**

GIS Analyst	3.0 hrs @ \$62/hr.	\$ 186.00
Services Assistant	16.0 hrs @ \$40/hr.	\$ 640.00

**Pre-App-Tierra Robles Subdivision Proposed CSD**

Executive Officer	2.5 hrs @ \$108/hr.	\$ 270.00
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**Pre-app - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation**

Executive Officer	3.0 hrs @ \$108/hr.	\$ 324.00
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**TOTAL AMOUNT DUE** \$ 6,799.33

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**Shasta LAFco Contract Planning Services FY 2016-17 Billing FEBRUARY 2017**

Planwest Partners Inc.	Task	Hourly Rate	Account	FY 2016-17 Budget	Budget Amend	Nov.	Dec.	Jan.	Hours and Expenses								Total on Budget	Remaining Budget	
									Executive Officer	Sr Analyst	GIS Analyst	Service Specialist	Admin-Strator	Services Assistant	Expense	February Total			
	MGR/SOI - Review & Analysis (see Note 1 below)			\$10,000.00		\$1,795.00	\$395.00	\$1,408.00									\$826.00	\$10,000.00	\$0.00
	CDFW Fees		52671	\$0.00													\$0.00	\$0.00	\$0.00
	GIS Services		52675	\$1,050.00													\$0.00	\$0.00	\$1,050.00
	Mileage Reimbursement		52676	\$0.00													\$0.00	\$0.00	\$0.00
	Postage Printing		52677	\$200.00													\$0.00	\$0.00	\$200.00
	Public Hearing Notice		52678	\$250.00													\$0.00	\$0.00	\$250.00
	Office Supplies		52679	\$0.00													\$0.00	\$0.00	\$0.00
	Municipal Services Review Preparations		52680	\$8,500.00													\$0.00	\$0.00	\$8,500.00
	<b>Staffing Services Planwest Partners Inc.(see Note 2)</b>			<b>\$60,000.00</b>		<b>\$4,190.44</b>	<b>\$4,878.44</b>	<b>\$5,315.50</b>									<b>\$5,379.33</b>	<b>\$35,913.07</b>	<b>\$24,086.93</b>
	General Staffing Services		52006														\$2,160.50	\$304.00	
	Policies & Procedures Update-Chapters 1 & 2		52006														\$1,592.00	\$1,592.00	
	Staff Coordination		52006														\$0.00	\$0.00	
	Noticing & Staff Reports		52006														\$62.00	\$62.00	
	Response to Public Information Requests		52006														\$324.00	\$324.00	
	Budget Preparation		52006														\$720.83	\$720.83	
	Commission Meetings - prep & attendance		52006														\$216.00	\$216.00	
	Executive Committee Meetings		52006														\$0.00	\$0.00	
	Fiscal Committee Meetings		52006														\$0.00	\$0.00	
	<b>Staffing Services Supplies (see Note 3 below)</b>			<b>\$3,655.00</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>									<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,655.00</b>
	Mileage Reimbursement		52070	\$240.00													\$0.00	\$0.00	\$240.00
	Office Expense		52080	\$740.00													\$0.00	\$0.00	\$740.00
	Office Supplies		52100	\$1,500.00													\$0.00	\$0.00	\$1,500.00
	Postage and Shipping		52110	\$675.00													\$0.00	\$0.00	\$675.00
	Printing		52120	\$500.00													\$0.00	\$0.00	\$500.00
	<b>Application Processing /Pre-app expenses (see Note 4 below)</b>																\$0.00	\$0.00	\$0.00
	Shasta CSD Foxwood Annex.#2 (#2014-01B)		52402														\$0.00	\$0.00	
	Burney WD Highmark Annex.#2 (#2014-01A)		52402														\$0.00	\$0.00	
	Pre-App-W.Ridge/Calle Campo Redding Annex																\$0.00	\$0.00	
	Pre-App-Tierra Robles Subdivision Proposed CSD			\$5,000.00													\$270.00	\$1,565.00	\$3,435.00
	Pre-App - Tierra Oaks Redding SOI/Annex																\$0.00	\$0.00	
	Pre-app - Proposed Cemetery District Consolidation			\$0.00													\$324.00	\$1,050.00	-\$1,050.00
	<b>Application Processing Supplies</b>			<b>\$0.00</b>													<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
	Mileage Reimbursement		52418	\$0.00													\$0.00	\$0.00	\$0.00
	Misc. Other		52419	\$0.00													\$0.00	\$0.00	\$0.00
	Postage and Shipping		52420	\$0.00													\$0.00	\$0.00	\$0.00
	Printing		52430	\$0.00													\$0.00	\$0.00	\$0.00
	Public Hearing Notice		52440	\$0.00													\$0.00	\$0.00	\$0.00
	Office Supplies		52450	\$0.00													\$0.00	\$0.00	\$0.00
	<b>Total Hours</b>					<b>45.50</b>	<b>1.00</b>	<b>5.75</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>16.00</b>				<b>\$826.00</b>	<b>\$47,478.07</b>	<b>\$31,176.93</b>
	<b>Total Costs</b>					<b>\$6,147.44</b>	<b>\$5,273.44</b>	<b>\$1,088.00</b>					<b>\$1,260.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$6,799.33</b>	<b>\$47,478.07</b>	<b>\$31,176.93</b>
	<b>Monthly Expenses</b>																		
	February (1 trip) Miles: 336 @ \$0.535/mile																		<b>\$180.83</b>
	<b>Monthly Expense Total</b>																		<b>\$180.83</b>

Notes 1 & 2: These shaded rows provides budget amount & expenses summary for accounts, all itemized expenses below are summed up in this shaded row.  
 Note 3: Budgeted expenses specifically for Staffing Services Supplies routinely incurred at Redding Office only charged in special circumstances and explained on invoice  
 Note 4: Charges only for Application Processing with filed application or Pre-app review expenses with signed agreement