



## INVOICE

**DATE:** March 31, 2017 **INVOICE #:** 17-235-03  
**TO:** Shasta Local Agency Formation Commission (LAFCo)  
**PROJECT:** LAFCo Planning and Staffing Services for **MARCH 2017**

### Staffing Services:

**Exec Committee / Commission Meetings:** Attended March 1 Executive Committee meeting. Reviewed FY 2017-18 MSR SOI Update Schedule and presented countywide fire services options for Executive Committee consideration. Prepared and distributed staff reports and agenda items for April 6 Commission meeting.

**Budget:** Prepared proposed FY 2017-18 Budget for April 6 hearing. Reviewed FY 2016-17 Budget line item amendments prepared by Manager.

**Staffing Coordination:** Coordinated with manager on preparation of April 6 commission agenda packet distributed March 30. This included February 2, 2017 Commission Meeting Minutes and Fiscal Information – January and February bank statements, reconciliations, disbursements. Worked with manager on responding to requests for information and research on applicable LAFCo statutes. Provided input for CalPERS –Electronic Fund Payments Mandate & Waiver Request. Reviewed resolutions for prior commission action on MSRs/SOI Updates for action at April 6 meeting.

**General Staffing Services:** Continued update of Policy Chapter 3. Responded to property owner request for information related to Stephens Ridge Project potential annexation to CSA17 Cottonwood for wastewater services. Responded to State Controller's Office inquiry into two potential Shasta County inactive districts– Fall River Valley Irrigation District & Joint Hwy District #21. Worked with manager to research records and determine these already dissolved. Discussed CALAFCO Northern Section Board vacancy with Executive Director. Contacted special district representatives to determine interest.

**Municipal Service Reviews (MSR) and Sphere of Influence (SOI) Updates for FY 2016-17:** Distributed to Commission and posted to website five County Service Area (CSA's 2-Sugarloaf; 3 Castella; 6-Jones Valley; 13-Alpine Meadows; and 17 Cottonwood) MSR/ SOI Updates. Prepared staff reports and resolutions for commission hearing on April 6. Proposed City of Anderson Sphere of Influence reduction to exclude resource lands not requiring services.

### App - Alpine Meadows Annex

Annexation proceedings initiated by County of Shasta resolution of application. Reviewed application materials, deemed application complete and issued certificate of filing. Prepared staff report and supporting findings for proposed annexation of approximately 1.8 acres (3 parcels) generally located north of State Route 44 and East of Emigrant Trail in Shingletown. Staff report considered 16 specific factors as they relate to the proposed action, per G.C. § 56668 to help inform the Commission in its decision-making process. Determined 100% property owners and waived hearing and protest proceeding.

**Pre-App-Tierra Robles Subdivision Proposed CSD** – Had follow-up conversation with County staff on mechanism for conserving open space and managing natural resources on parcels proposed to be conveyed to CSD on Formation

TEL: (707) 825-8260  
 FAX: (707) 825-9181

P.O. Box 4581  
 Arcata, CA 95518

planners@planwestpartners.com  
 www.planwestpartners.com

**Pre-app - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation** – Started Plan for Services for proposed consolidation.

**Pre-app - Anderson Service Extension – Weaver** - Reviewed pre-application materials submitted to extend water services to parcel within the City SOI. Discussed potential for annexation per LAFCo policy. Conveyed application requirements to the property owner. Sent resolution of application example to City staff.

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

**Staffing Services & Expenses**

Executive Officer	33 hrs @ \$108/hr.	\$ 3,564.00
Senior Analyst	0 hrs @ \$88/hr.	\$ 0.00
GIS Analyst	0 hrs @ \$62/hr.	\$ 0.00
Services Assistant	5.75 hrs @ \$40/hr.	\$ 230.00
Mileage 284 @ \$0.535/mi		\$ 151.94

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

Executive Officer	5 hrs @ \$108/hr.	\$ 540.00
Services Assistant	2 hrs @ \$40/hr.	\$ 80.00
Mileage (Castella CSA site visit) 98 mi @ \$0.535/mi		\$ 52.43

**App- Alpine Meadows Annex**

Executive Officer	16.50 hrs @ \$108/hr.	\$ 1,782.00
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**App - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation**

Executive Officer	2 hrs @ \$108/hr.	\$ 216.00
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**Pre-App-Tierra Robles Subdivision Proposed CSD**

Executive Officer	1 hrs @ \$108/hr.	\$ 108.00
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**Pre-app - Anderson Service Extension**

Executive Officer	2 hrs @ \$108/hr.	\$ 216.00
GIS Analyst	0.50 hrs @ \$62/hr.	\$ 31.00

**TOTAL AMOUNT DUE**

**\$ 6,971.37**

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 2016-17 Billing MARCH 2017**

Planwest Partners Inc.		FY 16/17 Budget Amend		Hours and Expenses							Total on Budget	Remaining Budget	
Task	Account	Jan.	Feb.	Executive Officer	Sr Analyst	GIS Analyst	Service Specialist	Admini- strator	Services Assistant	Expense	March Total		
Hourly Rate				\$108.00	\$88.00	\$62.00	\$58.00	\$58.00	\$40.00				
<b>MSR/SOI - Review &amp; Analysis (see Note 1) Amended</b>		<b>\$14,067.00</b>	<b>\$1,408.00</b>	<b>\$826.00</b>							<b>\$672.43</b>	<b>\$10,672.43</b>	<b>\$3,394.57</b>
CDFW Fees	52671	\$0.00	\$0.00	\$0.00							\$0.00	\$0.00	\$0.00
GIS Services	52675	\$2,600.00	\$248.00	\$0.00							\$0.00	\$2,131.00	\$469.00
Mileage Reimbursement	52676	\$0.00	\$0.00	\$0.00							\$0.00	\$0.00	\$0.00
Postage Printing	52677	\$200.00	\$0.00	\$0.00							\$0.00	\$0.00	\$200.00
Public Hearing Notice	52678	\$150.00	\$0.00	\$0.00							\$0.00	\$0.00	\$150.00
Office Supplies	52679	\$0.00	\$0.00	\$0.00							\$0.00	\$0.00	\$0.00
Municipal Services Review Preparations	52680	\$11,117.00	\$1,160.00	\$826.00	5.00				2.00	52.43	\$672.43	\$8,541.43	\$2,575.57
<b>Staffing Services Planwest Partners (see Note 2) Amended</b>		<b>\$58,000.00</b>	<b>\$5,315.50</b>	<b>\$5,379.33</b>							<b>\$3,945.94</b>	<b>\$34,479.68</b>	<b>\$23,520.32</b>
General Staffing Services	52006				15.00						\$1,620.00	\$1,620.00	
Policies & Procedures Update-Chapter 3	52006				2.00				5.75		\$446.00	\$446.00	
Staff Coordination	52006				12.00						\$1,296.00	\$1,296.00	
Noticing & Staff Reports	52006										\$0.00	\$0.00	
Response to Public Information Requests	52006										\$0.00	\$0.00	
Budget Preparation	52006				3.00						\$324.00	\$324.00	
Commission Meetings - prep & attendance	52006									\$151.94	\$151.94	\$151.94	
Executive Committee Meetings	52006				1.00						\$108.00	\$108.00	
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>\$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>													
App - Shasta CSD Foxwood Annex. #2 (#2014-01B)	52402	\$0.00									\$0.00	\$0.00	\$0.00
App - Burney WD Highmark Annex.#2 (#2014-01A)	52402	\$0.00									\$0.00	\$0.00	\$0.00
App - CSA 13 Alpine Meadows - WillisHerrera Annex		\$4,300.00			16.50						\$1,782.00	\$1,782.00	\$2,518.00
App - Pine Grove - Fall River Mills Cemetery Dist Consolidation		\$5,000.00	\$162.00	\$324.00	2.00						\$216.00	\$1,266.00	\$3,734.00
Pre-App-Tierra Robles Subdivision Proposed CSD		\$5,000.00	\$108.00	\$270.00	1.00						\$108.00	\$1,673.00	\$3,327.00
Pre-App - Tierra Oaks Redding SOI/Annex		\$0.00									\$0.00	\$0.00	\$0.00
Pre-App-W.Ridge/Calle Campo Redding Annex		\$0.00									\$0.00	\$0.00	\$0.00
Pre-app - Anderson Service Extension		\$0.00			2.00	0.50					\$247.00	\$247.00	-\$247.00
<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>					59.50	0.00	0.50	0.00	0.00	7.75			
<b>Total Costs</b>			<b>\$270.00</b>	<b>\$594.00</b>	<b>\$6,426.00</b>	<b>\$0.00</b>	<b>\$31.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$310.00</b>	<b>\$204.37</b>	<b>\$6,971.37</b>	<b>\$46,825.11</b>

Monthly Expenses	Expense
Mar 1-3 Arcata Redding roundtrip : 284@\$0.535/mi.	\$151.94
Mar 2 Castella Redding roundtrip: 98@\$0.535/mi.	\$52.43
<b>Monthly Expense Total</b>	<b>\$204.37</b>

Notes 1 & 2: These shaded rows provides budget amount & expenses summary for 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



## INVOICE

**DATE:** April 30, 2017 **INVOICE #:** 17-235-04

**TO:** Shasta Local Agency Formation Commission (LAFCo)

**PROJECT:** LAFCo Planning and Staffing Services for **APRIL 2017**

### **Staffing Services:**

**Exec Committee / Commission Meetings:** Prepared and distributed materials and attended April 6 commission meeting. Updated FY 2017-18 MSR SOI Update Schedule and presented five year MSR SOI Update Schedule at April 25 Executive Committee consideration. Responded to committee questions on five year cycle proposal. This will be presented to Commission June 1.

**Budget:** Presented proposed FY 2017-18 Budget at April 6 commission hearing. Coordinated distribution of proposed FY 2017-18 Budget to member organizations with Manager.

**Staffing Coordination:** Coordinated with manager on April 6 commission meeting. This included February 2, 2017 Commission Meeting Minutes and Fiscal Information – bank statements, reconciliations, disbursements. Worked with manager on responding to requests for information and research on applicable LAFCo statutes.

**General Staffing Services:** Met with new special district alternate member Patricia Clark on April 25. Met with Fall River Valley CSD Board Member Jerry Monath and General Manager Bill Johnson at CSD offices on April 26 to review plan for services and discuss potential annexations. Reviewed mapping and APN list for parcels to be potentially annexed, services capacities, and schedule for completing draft plan for services distributed prior to the meeting.

**Municipal Service Reviews (MSR) and Sphere of Influence (SOI) Updates for FY 2016-17:** Presented to Commission 2017 MSR/ SOI Updates for five County Service Area (CSA's 2; 3; 6; 13; and 17). Continued preparation of City of Anderson 2017 MSR/ SOI Update.

### **App - Alpine Meadows Annex**

Presented Willis/Herrera annexation staff report and supporting findings to Commission April 6 for approximately 1.8 acres addition to CSA 13 Alpine Meadows. Determined 100% property owners and waived hearing and protest proceeding. Commission adopted Mitigated Negative Declaration for CEQA compliance.

**Pre-App-Tierra Robles Subdivision Proposed CSD** – no activity this period

### **Pre-app - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation** –

Distributed Plan for Services for proposed consolidation. Met with Pine Grove – Fall River Mills Cemetery District Board members at McArthur office on April 26 to review plan for services and LAFCo consolidation review procedures. Prepared draft certificate of filing for consolidation application setting June 1 hearing date. Prepared draft public notice.

**Pre-app - Anderson Service Extension – Weaver** - no activity this period.

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

**Staffing Services & Expenses**

Executive Officer	34.0 hrs @ \$108/hr.	\$ 3,672.00
Two trips - Mileage	284 x 2 @ \$0.535/mi	\$ 303.88

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

Executive Officer	9.0 hrs @ \$108/hr.	\$ 972.00
Services Assistant	10.75 hrs @ \$40/hr.	\$ 430.00
GIS Analyst	1.50 hrs @ \$62/hr.	\$ 93.00

**App- Alpine Meadows Annex**

Executive Officer	2.50 hrs @ \$108/hr.	\$ 270.00
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**App - Proposed Pine Grove – Fall River Mills Cemetery District Consolidation**

Executive Officer	16.50 hrs @ \$108/hr.	\$ 1,782.00
GIS Analyst	2 hrs @ \$62/hr.	\$ 124.00

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

Executive Officer	0 hrs @ \$108/hr.	\$ 0.00
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**Pre-App - Anderson Service Extension**

Executive Officer	0 hrs @ \$108/hr.	\$ 0.00
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<b>TOTAL AMOUNT DUE</b>		<b>\$ 7,646.88</b>
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