



DATE:	07/01/2024
INVOICE #:	24-135-06
TOTAL DUE:	\$ 8,182.78

BILL TO:

Shasta LAFCO
 PO Box 8693
 South Lake Tahoe, CA 96158

PAY TO:

Planwest Partners, Inc
 P.O. Box 4581
 Arcata, CA 95518
 Tax ID #: 90-0262382

PROJECT:	SHASTA LAFCO PLANNING AND STAFFING SERVICES	JUNE 2024
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Staffing Coordination, General Staffing Services, Noticing & Staff Reports

Prepared for and attended June 6, 2024, Regular Commission meeting. Conducted additional research regarding CSA #4. Met with John Andoh to discuss history of CSA #4 and potential next steps for determining if approved special assessment from the agency’s formation is still valid. Reviewed financial documentation and QuickBooks files in preparation of FY2023-24 audit.

Municipal Service Reviews (MSR) Sphere of Influence (SOI) Updates

Drafted the following sections for internal review of the City of Anderson MSR/SOI Update: Agency Background (Formation, Boundary, Land Use and Zoning, Population), Organizational Structure (Governance, Staffing, Accountability and Transparency), and Municipal Services (Development, Finance, Parks and Recreation, Public Works, Law Enforcement, Other Service Providers).

Followed up with staff from CSA #1 – Shasta County Fire and Burney FPD regarding the information request sent out in May. Received and organized resources from CSA #1 – Shasta County Fire and Burney FPD. Set up the structure for the CSA #1 – Shasta County Fire MSR/SOI Update and the Intermountain Fire Services MSR/SOI Update.

Application – Shasta Fire Protection District Formation

Coordinated Shasta FPD boundary description for BOE filing. Spoke with representative from Vestra regarding official boundary and requirements for legal description. Spoke with Shasta CSD staff regarding asset transfer agreement.

<i>Staffing Services Amount Due:</i>	\$ 5,172.78
<i>MSR/SOI Update Amount Due:</i>	\$ 2,165.00
<i>Application Processing/Pre-App Review Expenses:</i>	\$ 195.00
TOTAL AMOUNT DUE THIS INVOICE:	\$ 8,182.78

(see attached spreadsheets for detailed cost breakdown)

EO /MSR Contract Amounts:	\$ 107,740.00
Total Billed to Date:	\$ 111,628.85
Amount Remaining:	- \$ 3,888.85

Shasta LAFCo Contract Planning Services FY 2023-24 Billing June 2024

Planwest Partners Inc.				Hours and Expenses									
Task	Account	FY 2023-24 Budget	Budget Amend	Principal Planner	Sr Advisor	Sr Analyst (EO)	Assoc. Planner	GIS Manager	Assist Planner/ Serv Specialist	Expense	June Total	Total on Budget	Remaining Budget
Hourly Rate				\$150.00	\$140.00	\$130.00	\$110.00	\$110.00	\$95.00				
MSR/SOI - Review & Analysis		\$25,000.00	\$23,740.00								\$2,165.00	\$24,290.00	-\$550.00
GIS Services	52675										\$0.00	\$3,575.00	
MSRs SOI Updates	52680					3.50			18.00		\$2,165.00	\$20,715.00	
Staffing Services Planwest Partners Inc.		\$78,150.00	\$84,000.00								\$5,172.78	\$87,338.85	-\$3,338.85
General Staffing Services/ Transition	52006			0.50	3.00	13.50		0.50	4.00		\$2,685.00	\$48,251.50	
Accounting	52006					5.00					\$650.00	\$650.00	
Noticing, Staff Reports & Budgeting	52006				3.00						\$420.00	\$24,555.12	
Public/Agency Info Requests	52006					2.75					\$357.50	\$5,189.89	
Budget Preparation	52006					2.00					\$260.00	\$260.00	
Commission /Exec Committee Meetings	52006				9.00					\$190.28	\$1,450.28	\$8,432.34	
Application Processing /Pre-app review Expenses- EO											\$195.00	\$17,470.00	
Fall River Valley FPD Reorg re-application		\$2,500.00									\$0.00	\$2,550.00	-\$50.00
Fall River Valley CSD-Annexation		\$1,800.00									\$0.00	\$280.00	\$1,520.00
Shasta CSD - Fire Services Divestiture		\$22,500.00									\$0.00	\$2,845.00	\$19,655.00
Old Shasta FPD Formation by petition		\$30,000.00				1.50					\$195.00	\$9,387.50	\$20,612.50
Application Processing Supplies		\$0.00									\$0.00	\$0.00	\$0.00
Hours				0.50	15.00	28.25	0.00	0.50	22.00		\$0.00		
Total Costs		\$103,150.00	\$107,740.00	\$75.00	\$2,100.00	\$3,672.50	\$0.00	\$55.00	\$2,090.00	\$190.28	\$8,182.78	\$129,098.85	-\$3,888.85