

Proposal for:

Town of Windsor and Subsidiary Water District MSR



Submitted to:

Sonoma LAFCo
111 Santa Rosa Avenue, Suite 240
Santa Rosa, CA 95404

February 20, 2020

Submitted by:

PLANWEST
PARTNERS, INC. 

February 19, 2020

Sonoma Local Agency Formation Commission
Attn: Mark Bramfitt, Executive Officer
111 Santa Rosa Avenue, Suite 240
Santa Rosa, CA 95404

RE: Town of Windsor and Subsidiary Water District Municipal Service Review

To Mr. Bramfitt,

Planwest Partners proposes to prepare a Municipal Service Review (MSR) for the Town of Windsor and the subsidiary water district that provides municipal water service, the Windsor Water District. Our team understands the importance of collecting, organizing and analyzing services information and conveying that information for Commission review and action.

Planwest currently provides staffing services to Del Norte, Humboldt, Shasta and Trinity LAFcos. In addition, we recently provided services to Marin LAFco, preparing two regional MSRs for the Cities of Novato and San Rafael and surrounding services providers. This required direct interaction with many districts and consideration and determinations for several different services including municipal and water services in the regions. To prepare informative MSRs our team works on building relationships with member agencies, providing them with resources and technical assistance, and involving them in the MSR process.

Our experience with multiple LAFcos in California has provided us ample experience with district reorganizations. Most recently we supported the Rio Dell Fire Protection District with preliminary discussions for annexation of three different volunteer fire districts to provide consolidated service to a portion of the Eel River Valley. This process included in depth consideration of various funding mechanisms including tax exchange agreements and special assessments. We have also conducted many water services MSRs, most recently for Shasta LAFco which included Cottonwood, Bella Vista, and Burney Water Districts. This process involved taking stock of current infrastructure needs and providing an overview of budgeting considerations.

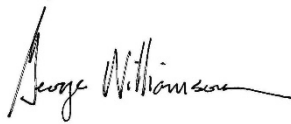
Bartle Wells Associates offers extensive financial planning services including projecting key revenue and expense items to provide guidance on Town planning efforts. Their financial plans typically include current fund balances, historical and projected tax and fee revenues by source, population growth and planned developments, operations expenditures by category, and the latest capital improvement project costs. Planwest and Bartle Wells Associates have experience working together on a community services district financial plan and rate study and on a fire protection district special assessment. Bartle Wells has also been the financial consultant for Sonoma Water for many years and is currently contracted to develop financial plans, rate studies, and capacity fee studies for all eight districts and zones.

Our team is structured to provide the Commission with relevant LAFco expertise, outstanding technical support, financial expertise and cost-effective administration to deliver a complete MSR

for Commission consideration. The Planwest team is dedicated to providing a clear and concise assessment of the Town of Windsor municipal services in a document that can be used as a resource for Sonoma LAFCO consideration of potential Sphere of Influence changes and how to efficiently provide water services to best serve the community. We'll provide determinations that address potential sphere of influence amendments for both the Town and the subsidiary District, to assist the Commission in determining whether the subsidiary District should be dissolved with the Town serving as the successor agency.

We appreciate the opportunity to submit our proposal and look forward to the opportunity to answer any questions you may have.

Sincerely,

A handwritten signature in black ink that reads "George Williamson". The signature is fluid and cursive, with a long horizontal stroke at the end.

George Williamson AICP, Principal Planner
Planwest Partners, Inc.
707.825.8260, georgew@planwestpartners.com
1125 16th Street, Suite 200, Arcata, CA 95521



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Attachment A – Budget with Project Costs and Hourly Staff

Attachment B – Example Completed MSR – San Rafael Regional MSR (provided electronically)

1.0 TEAM OVERVIEW & QUALIFICATIONS

PLANWEST PARTNERS, INC.

Planwest Partners is a community planning consulting firm serving North Coast communities since 1997. We specialize in LAFCo staffing and support services including preparation of Municipal Service Reviews (MSR) for dozens of districts across Marin, Humboldt, Shasta, Del Norte, San Diego, and other counties. Through successful completion of contracted LAFCo work and by regularly attending CALAFCO Conferences and Staff Workshops, we remain abreast of current Cortese-Knox-Hertzberg Act regulations and LAFCo policies. Planwest also has more than 24 years of combined Executive Officer experience. Currently, we provide contract staffing services to Humboldt, Del Norte, Shasta, and Trinity LAFCOs, and previously to Mendocino LAFCo. In addition, we formerly acted as Marin LAFCo's interim Executive Officer.

Planwest also provides support services to cities, counties, and special districts including preparation of Housing Elements and General Plan updates and permit coordination for a variety of projects including water and wastewater systems. This provides us with in depth knowledge of different districts and municipalities and has provided us with ample experience in coordinating and working with staff on gathering necessary information to pull together complex documents.

Our proposed team includes Principal Planner George Williamson, Project Manager Vanessa Blodgett, GIS Analyst Jason Barnes, and Associate Planner Krystle Heaney along with Principal Consultant Douglas Dove and Project Consultant Abigail Seaman from Bartle Wells Associates. Together, our team has the expertise, experience, and dedication to conduct a thorough and efficient MSR.

BARTLE WELLS ASSOCIATES

Bartle Wells Associates (BWA) is an independent financial advisory firm with expertise in the areas of water, wastewater, and stormwater finance. BWA was established in 1964 and has over 50 years of experience advising cities, special districts, and other agencies on the complexities and challenges in public finance. We have advised over 550 public agency clients throughout California and the western United States. We have a diversity of abilities and experience to evaluate all types of financial issues faced by local governments and to recommend the best and most-practical solutions.

BWA has a highly qualified professional team of seven full-time consultants. Our education and backgrounds include finance, civil engineering, business, public administration, public policy, and economics. BWA specializes in three professional services: utility rate and fee studies, financial plans, and project financing. We are one of the few independent financial advisors providing all three of these interrelated services to public agencies.

2.0 APPROACH TO PROVIDING SERVICES & SCOPE OF WORK

APPROACH TO PROVIDING SERVICES

Planwest prepares both routine and complex special studies as mandated by LAFCo statute, including municipal service reviews and spheres of influence updates. Our approach is to provide customized outreach and assistance to member agencies to increase understanding of service, governance and funding needs. Given the range of characteristics of service providers, a one size fits all approach is not always appropriate. We focus on service review scope and content, developing service specific MSRs that consider shared trends relating to the adequacy, capacity, and cost of providing essential governmental services. We present our analysis in a clear format with both written determinations and supplemental tables, graphs, and spatial data to demonstrate our conclusions. The MSRs are a significant resource and have lasting value for member agencies and the public as time goes on.

The Planwest team is well qualified and committed to preparing the Town of Windsor and Subsidiary Water District MSR as outlined in the RFP. Our approach to providing staffing services is grounded in providing quality work products, responsive customer service, and collaborative problem-solving. Planwest Partners currently provides contract Executive Officer and staffing services to the Del Norte, Humboldt, Shasta, and Trinity LAFcos. In addition, Planwest recently completed two regional MSRs for Marin LAFco and formerly provided interim Executive Officer services. This prior experience has exposed us to a wide range of municipal services including water delivery, wastewater collection, fire and emergency response, mosquito abatement, police, cemetery, and hospital services.

Using our past experience working with a wide range of municipal services we will conduct a thorough examination of the Town of Windsor and its potential for taking on additional services such as water delivery. This will include looking at long range budgeting, staffing levels, and other factors. We will also provide a detailed overview of the Subsidiary Water District including current funding mechanisms, infrastructure capacities and needs, water quality, and staffing among other items. This will allow us to provide the best governance determinations and recommendations for both entities that will continue to provide a high level of service for Town residents.

SCOPE OF WORK

Task 1 – Setting & Agency Profile

A setting will be established that describes the context for the provision of services within the Districts. This includes evaluating growth and population projections, identifying disadvantaged unincorporated communities in the region, and describing current and proposed land uses on a regional scale. A GIS analysis component will be included in the regional setting to assist in identification of potential areas of growth.

An updated agency profile will be prepared that describes the core service, functions, boundaries, and infrastructure for the Districts. The brief profile will incorporate information collected and analyzed from research and direct contact with the Districts. The agency profiles will generally include the following information:

- Formation and Development
- Adopted Commission Boundaries
- Organizational Structure
- General Governmental Services
- Financial Summary

A Planwest representative will coordinate with Town of Windsor and water district personnel to gather information and address any questions or concerns about the MSR process.

Deliverables: Agency profiles

Task 2 – Service Evaluation & Determination

The Planwest Team will conduct an evaluation of the agencies' services that provides LAFco with an understanding of the provided services adequacy and efficiency. Evaluations will consider service levels, service demand, financing challenges and opportunities, infrastructure needs and deficiencies, opportunities for shared facilities, and governance structure options including potential consolidation of the water district with the town. BWA will provide a detailed overview of the Town's and Water District's financial status including ability to provide for current and future service demands. Written determinations will be made to address the mandatory factors required under

statute (Section 564303) in addition to potential sphere of influence amendments for the Districts and indicating whether the subsidiary district should be dissolved with the Town serving as the successor agency.

Deliverables: MSR preparation, service evaluation and determinations, Governance Options

Task 3 – Draft Report & Public Review

A draft report will be prepared and presented to the Commission for discussion and feedback. The project team will provide agency information and draft determinations for the Sonoma LAFCo staff use. The draft report will be a complete document in Microsoft Word format and include an introduction, setting, agency profile, services evaluation, and written determinations. Input received by the affected agencies and interested stakeholders will be incorporated into the final MSR.

Deliverables: Draft Town of Windsor and Windsor Water District MSR

Task 4 – Final Report & Adoption

A final MSR will be presented to the Commission for action at a noticed public hearing. The final report will include updates from earlier drafts based on new information or comments generated during the public review period. The final report will be presented to the Commission for discussion and feedback as a Public Hearing agenda item. A Planwest staff representative will be present to answer questions on the MSR and explain details. The Commission will consider formally adopting the MSR and the written MSR determinations.

Deliverables: Public Hearing Noticing, Commission Meeting Attendance in Santa Rosa, Town of Windsor and Windsor Water District Final MSR

3.0 PROJECT SCHEDULE

Project Tasks and Subtasks	Start Date	End Date
Task 1: Data Collection and Review	March 2020	May 2020
Review Prior MSRs	March 2020	March 2020
Review Online Information Sources	March 2020	April 2020
Coordination with Districts	April 2020	May 2020
Task 2: Service Evaluation and Determinations	May 2020	July 2020
Prepare District Profiles	May 2020	June 2020
District Staff Review	July 2020	July 2020
Task 3: Draft Report & Public Review	August 2020	October 2020
Administrative Draft MSR	August 2020	August 2020
Public Review Draft MSR	September 2020	September 2020
Track and Compile Public Comments	September 2020	October 2020
Task 3: Final Report and Adoption	November 2020	November 2020
Prepare Final MSR	November 2020	November 2020
Present Final at Commission Meeting	December 2, 2020	

4.0 INFORMATION & ASSISTANCE FROM SONOMA LAFCO

In order to complete the Town of Windsor and Subsidiary Water District MSR, Planwest will need GIS shapefiles of current Town/district boundaries and spheres of influence (when not available online) or currently adopted maps for each district which can then be digitized by Planwest. We will also need LAFCo staff time for review of draft documents and coordination and dissemination of draft MSR, and Final MSR.

5.0 PROJECT TEAM KEY PERSONNEL

Staff planners and spatial analysts have prepared MSRs for nine LAFCo's. Planwest is involved in overseeing LAFCo's planning and regulatory activities and works closely with the Commission, member agencies, and the public on an on-going basis. We've included qualifications of our core project team below. The following section describes the roles and general duties of each staff person.

George Williamson, AICP Principal Planner

George Williamson, Principal Planner and majority owner of Planwest Partners Inc., has over 35 years of experience working as a planner in California, Oregon, Washington, and Arizona. Mr. Williamson has been providing contract planning and environmental services on the California North Coast since 1997 and is currently the Executive Officer for Shasta LAFCO. He has provided planning and environmental services to the Humboldt Bay Harbor District, Crescent City Harbor District, and the City of Point Arena. Since moving to the North Coast, he has been involved in community planning, environmental compliance and economic development activities. His community, land use and transportation planning experience offer a broad perspective when engaging organizations, agencies and stakeholders in developing investment, capacity and implementation strategies. He has both principal and project management experience, with community and economic development expertise.

George Williamson, Principal Planner EDUCATION

San Diego State University, CA
Master of City Planning, 1988

Portland State University
B.S., Social Science w/ Urban Studies
Certificate, 1976

TRAINING/PROFESSIONAL AFFILIATIONS

American Institute of Certified Planners,
1983

American Planning Association Life
Member, 1981

Arcata Energy Committee Chairperson,
2014 current

CALAFCO Outstanding LAFCo Professional
for 2018

Vanessa Blodgett
Senior Planner

Vanessa Blodgett will serve as the Project Manager for the Town of Windsor and Subsidiary Water District MSR. She has over 12 years of experience working with national, state, private, and local agencies on resource management, community infrastructure and planning projects. Her knowledge and leadership in policy development and program implementation has shaped outcomes for projects such as the City of Ferndale Wastewater Treatment Project; the Samoa Town Master Plan; the City of Arcata Land Use Code; and the City of Ferndale Historical and Cultural Resources and Safety Element Updates. Vanessa has expertise in land use planning and environmental compliance and mitigation monitoring programs subject to the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA) which includes the preparation and processing of planning documents, environmental permits, environmental impact reports, mitigated negative declarations, policy analysis, and implementation programs.

Vanessa Blodgett, Senior Planner & Partner

EDUCATION

University of California Santa Cruz
 Environmental Studies/ Earth Sciences,
 2005

TRAINING/PROFESSIONAL AFFILIATIONS

HSU Leading Organizational and
 Community Change Courses, 2016 2017

Humboldt Area Foundation, Cascadia
 Leadership Program, 2011

APE Advanced CEQA Workshops 2009
 2019

Member, Association of Environmental
 Professionals, 2008 Present

Jason Barnes
GIS Analyst

Jason Barnes will serve as the team GIS analyst and will be an integral part of preparing the MSR including making detailed maps and diagrams to provide information to the Commission. Jason has over 10 years of experience working as an analyst, technician, cartographer, programmer, and university lecturer in the GIS field. His art background and broad technical experience lends well to GIS and cartographic visualization and communication. He has both principal and project management experience on a wide range of projects from socio-spatial, transportation, interactive mapping, and large area climate projects. He has been involved in activities involving many local consulting, non-profit, and federal agencies. He is currently on the board of directors for the Bigfoot Trail Alliance and is in the process of receiving his GIS Professional (GISP) certification through the GIS Certification Institute.

Jason Barnes, GIS Analyst

EDUCATION

Humboldt State University
 M.S., GIS, 2012

Northern Michigan University
 B.F.A., Photography, 2002

TRAINING/PROFESSIONAL AFFILIATIONS

Database Design Course, 2018

Bigfoot Trail Alliance Secretary, 2016
 Present

ESRI Training Courses Member, ASPRS
 2011 Present

Krystle Heaney
Associate Planner

Krystle Heaney has seven years of experience working with local, regional, and state agencies on project coordination and regulatory compliance. She had key roles in the San Rafael and Novato Regional MSR prepared for Marin LAFCo and has conducted several MSR/SOI updates Shasta LAFCo including a regional water services MSR. Additional MSR experience includes Humboldt, San Diego, and most recently Sonoma LAFCos. She has also attended workshops on MSR preparations and provides analyst and clerk services for Humboldt LAFCo which provides her with in depth knowledge of LAFCo policies and the Cortese-Knox-Hertzberg Act. Her background in geography provides her with a system view of projects that allows for consideration of all project components and needs. She has proven facilitation skills on large controversial projects and can effectively communicate with regulatory staff as well as the public. She will provide support and research assistance during the MSR preparation and revision. This includes preparing agency requests for information, conducting data collection and analysis, and developing baseline information used in the reports.

Krystle Heaney, Associate Planner
EDUCATION

California State University, Sacramento
 B.A. Physical Geography, 2013

TRAINING/PROFESSIONAL AFFILIATIONS

CNDDDB/RareFind/Bios Training

Member American Planning Association,
 2019 to Present

CALAFCOU: Deep Dive into MSRs
 July 2019

Douglas R. Dove
Principal Consultant (Bartle Wells Associates)

Douglas R. Dove is President of Bartle Wells Associates and directs the operation of the firm while maintaining a principal consultant's role. With over 28 years of consulting experience, he specializes in utility rate analysis, strategic financial planning and project financing. Mr. Dove has developed utility rate structures and financing plans for a wide variety of public infrastructure programs. He has managed the procurement of over \$1 billion in municipal debt and over \$300 million in state and federal grants and low-interest loans. Mr. Dove frequently shares his expertise and has given presentations at conferences including the Association of California Water Agencies (ACWA), the American Water Works Association (AWWA), the California Special District's Association (CSDA), and many others. Mr. Dove's expertise also includes assisting agencies in securing state and federal grants and loans and in issuing certificates of participation (COPs), revenue bonds, general obligation bonds, assessment district bonds, Marks-Roos revenue bonds, CFD (Mello-Roos) bonds, private placement loans and other types of debt. Mr. Dove recently finished his term on the board of directors of the National Association of Municipal Advisors (NAMA).

Douglas Dove, Principal
EDUCATION

University of California, Berkeley
 M.S. Civil Engineering

Drexel University, Philadelphia, PA
 B.S. Civil Engineering

TRAINING/PROFESSIONAL AFFILIATIONS

Certified Independent Professional
 Municipal Advisor

Registered Professional Engineer
 (PE# 45642)

MSRB Registered Municipal Advisor
 (Series 50)

Representative Projects

- **City of San Juan Bautista:** Water and Wastewater rate and capacity fee studies, DIF study, Revenue bonds for water and wastewater projects, continuing disclosure services.
- **City of Placerville:** Wastewater rate study and capacity fees
- **Grizzly Flats CSD:** Water rate study
- **Del Paso Manor Water District:** Comprehensive water financial plan and rate study.
- **Browns Valley ID:** Water rate study
- **Rio Linda/ Elverta Community Water District:** Comprehensive water financial plan, connection fee and rate study.
- **Madera County, CA:** Rate studies for twenty-three of county's water and sewer special service districts
- **City of Imperial, CA:** Water and wastewater financial plans and rate studies.
- **East Bay Municipal Utility District:** Comprehensive water rate study and AB 1600 capacity fee review, Wastewater cost-of-service review and capacity fee review, various other financial studies
- **City of Santa Barbara:** Comprehensive water rate and capacity fee study.
- **Napa-Berryessa Resort Improvement District:** Developed financing plan for water and wastewater public-private partnership (P3). Prepared assessment engineers report. Formed an assessment district and secured \$11.1 million in federal funding from US Department of Agriculture.
- **City of American Canyon:** Comprehensive, multi-year water and wastewater rate study.
- **City of Davis:** Comprehensive water rate study developed with a 15-member Water Advisory Committee. Completed a water capacity fee study for the City as well.

Abigail Seaman

Project Consultant (Bartle Wells Associates)

Abigail Seaman is a consultant with Bartle Wells Associates. She works closely with public agencies, engineers, legal counsel, and other consultants to develop water and sewer rates and assessments, and long-term financial plans for utility enterprises. Abigail helps agencies evaluate financing alternatives for public works projects, coordinates state and federal grant and loan applications, and evaluates bond refinancing opportunities.

Abigail Seaman, Consultant

EDUCATION

University of California, Davis

B.A. Economics

TRAINING/PROFESSIONAL AFFILIATIONS

MSRB Registered Municipal Advisor
(Series 50)

Representative Projects

- **Peninsula Community Services District:** Financial plan and rate study for water, sewer, stormwater, fire, and parks & recreation.
- **City of Arcata:** Water and wastewater rate and capacity fee study
- **Palmer Creek Community Services District:** wastewater rate and cost of service study
- **Marina Coast Water District:** water and wastewater capacity fee study
- **Florin Water District:** water rate and cost of service study
- **City of Davis:** Comprehensive water rate study developed with a 15-member Water Advisory Committee. Stormwater advisory services for South Davis Channel.
- **Yolo County:** Assessment Engineer's Report presenting costs per resident for water system consolidation project between North Davis Meadows CSA and City of Davis
- **Sonoma County Water Agency:** Wastewater rate and capacity fee studies for eight zones and districts
- **California Rural Water Association:** Preferred provider of on-call water and wastewater rate studies
- **City of Seaside:** Comprehensive Water and Wastewater Rate Study

- **Marina Coast Water District:** Wastewater Connection Fee Study
- **City of Pacifica:** Comprehensive wastewater rate study including debt financing scenarios
- **City of Alameda:** City-wide capital improvement budget and revenue projections; analysis of historical revenue and expense trends
- **City of Calistoga:** Long range utility financial plan, water and wastewater rate study
- **Town of Yountville:** Water and wastewater rate and cost of service study
- **City of American Canyon:** water and wastewater rate study
- **City of Solvang:** Water and wastewater rate study
- **Mariposa County:** Water and wastewater rate study for four districts within the County
- **Eastern Sierra Community Services District:** Wastewater capacity fee study
- **City of Coronado:** Breakeven analysis comparing the cost of imported water with project costs to improve City water infrastructure assuming project financing and escalating annual costs

SUPPORT STAFF:

Beyond the core team identified above, other Planwest Partners Inc. planning and technical support staff are available as needed to assist with document preparation and administrative tasks. The utilization of support staff will be strategic and focused based on preparation needs for the Parks and Recreation Services MSR. No subconsultants are proposed as part of the project team.

6.0 COST PROPOSAL & AVAILABILITY

See attached detailed budget for project costs and hourly staff rates. The project costs will not exceed \$47,595.60. All proposed team members currently have the availability to conduct the MSR according to the proposed schedule.

7.0 RELATED EXPERIENCE & REFERENCES

PLANWEST PARTNERS, INC.

Marin LAFCo Regional MSR Preparation

San Rafael Regional MSRs

Planwest completed draft Regional Settings with descriptions including unincorporated islands, growth and population projections, disadvantaged unincorporated communities; and land uses on a regional scale. We drafted Agency Profiles for regional entities including the City of San Rafael, Marinwood CSD, CSA #18 Las Gallinas, CSA #23 Terra Linda, CSA #13 Upper Lucas Valley, CSA #6 Gallinas Creek, CSA #9 Northbridge and CSA #19 San Rafael. Profiles included identifying core services, functions, boundaries, and funding descriptions. Planwest staff reviewed county GIS shapefiles and prepared agency boundary maps. We also completed draft background information and compiled data sources for evaluating services on a regional scale. This included initial services inventory research on Ambulance Service, Fire Protection, Libraries, Parks & Recreation, Police, Road Maintenance & Construction, Street Sweeping, Streetlighting, Open Space, Channel Maintenance, Parkway (median strip) and Landscape Maintenance, and Preserve Management.

Planwest completed draft District evaluations and determinations that considered service levels and demands, financing challenges and opportunities, infrastructure needs and deficiencies, opportunities for shared facilities, and governance structure options. Planwest staff completed a draft report and submitted it for staff review. We then accepted public comments and compiled a comment tracking chart which we used to revise and finalize the

Regional MSR. After incorporation of comments, a final version was prepared and submitted to Marin LAFCO for adoption.

Novato Regional MSR

Planwest prepared agency profiles and coordinated review with staff from City of Novato, Novato Sanitary District, Novato FPD, CSA # 20 Indian Valley, Bel Marin Keys CSD, CSA #1 Loma Verde and CSA 25 County Parks. We prepared Service Evaluation and Determinations addressing: Fire Protection, Parks & Recreation, Police, Road Maintenance & Construction; Solid Waste; Recycled Water; Channel & Levee Maintenance; Median Strips and Streetlighting; and Open Space. We prepared a draft report for public review with regional setting agency profiles and MSR determinations added. We then received input during two rounds of public comment as requested by the Commission and provided revisions and clarifications as requested before finalizing the document.

Contact Person: Jason Fried, Executive Officer, Marin Local Agency Formation Commission
Address: 1401 Los Gamos, Suite 220, San Rafael, California 94903
Phone: (415) 448-5877
Dates: 2018 – Present

Shasta LAFCo Water District MSR Preparation

Cottonwood Water District Municipal Services Review and Sphere of Influence Update

Planwest Partners, as Shasta LAFCo staff, prepared the 2019 Cottonwood Water District Municipal Services Review and Sphere of Influence Update. Preparation of the MSR included coordination with District staff to obtain background information on services and financial statements. Once background information was obtained, Planwest was able to conduct a thorough review of the District and provide determinations in accordance with CKH act. During evaluation of opportunities for shared services, the proximity to Anderson-Cottonwood Irrigation District that provides water services south, east, and north of Cottonwood was considered. The two districts are separated in the south by Cottonwood Creek and share a boundary along the town of Cottonwood's east side. Cottonwood is a Census Designated Place and according to the 2010 census, the population of the Cottonwood CDP was 3,316. However, the CDP boundary is smaller than the Cottonwood Water District boundary and reports a smaller population. Using GIS data and census blocks, Planwest's spatial analyst estimated District population as approximately 3,512 persons.

Contact Person: John Hollmer, District Manager
Address: 3282 Chestnut St. Cottonwood, CA 96022
Phone: (530) 347- 3472
Dates: 2018-19

DEL NORTE LAFCo STAFFING SERVICES

Planwest provides contract staffing services to the Del Norte LAFCo including the preparation, management and review of the SOIs and MSRs for each city, fire protection district, water district, sanitary district, and other special districts in Del Norte County. Ongoing Del Norte LAFCo responsibilities include managing MSRs and SOI Updates, preparing and conducting LAFCo meetings, providing information about procedures mandated by the CKH Act, maintaining the LAFCo website, securing and updating insurance for the Commission, preparing the budget and tracking Commission expenses, and attending staff conferences to keep current on LAFCo policies.

Del Norte Parks & Recreation District Formation & MSR Update

In 2014 the Del Norte County Fair Board recognized that, due to declining State revenues and support, the Fair Board was not sustainable as an independent entity. They worked with the Del Norte County Supervisors to form

a new countywide recreation and park district pursuant to Public Resources Code (PRC) Section 5780 et seq. The district purpose was to provide funding to maintain and operate the Del Norte County Fairgrounds. District formation was contingent on voter approval of a special sales tax that went before District residents on the November 2014 ballot. This ballot measure was passed by voters and the Del Norte County Fairgrounds Recreation and Park District was formed in 2014. Planwest Partners, working as Del Norte LAFCo staff, guided the Fair Board and County through the entire district formation process. This included preparing a MSR and preliminary Budget.

Contact Person: Blake Inscore Mayor and Del Norte LAFCo Member
 Address: 377 J Street Crescent City CA 95531
 Phone: (707) 218-1037 Email: binscore@crescentcity.org
 Dates: 2014 & 2019

Municipal Service Review and Sphere of Influence Update Mapping

Planwest Partners provides mapping services for four California Local Agency Formation Commissions (LAFCo): Del Norte LAFCo, Humboldt LAFCo, Shasta LAFCo and Trinity LAFCo. We work with many special districts including fire districts, water districts, and community services districts and help them determine appropriate service areas for their community. Utilizing local parcel, land use, transportation, and other spatial data, we create useful figures to help districts make intelligent, informed decisions for determining boundary and sphere of influence changes, annexations and detachments, and creating final Municipal Service Review figures.

Contact Person: Troy Nicolini, Humboldt LAFCo Special District Member
 Address: 1982 Gass Avenue, Samoa, CA 95564
 Phone: (707) 443-9042
 Dates: 2008 – Present

BARTLE WELLS ASSOCIATES

ROOT CREEK WATER DISTRICT

District Formation, Rate and Fee Studies

The Root Creek Water District (RCWD) is a California Water District located in Madera County, just north of the City of Fresno. BWA provided financial support for the formation of this District and has since worked for the District on a number of consulting projects including monthly utility service charges, capacity/connection fees, and agricultural rates/charges/assessments to support the District's importation of water. BWA attended public meetings and helped facilitate public workshops to inform stakeholders and receive public input prior to finalizing the new rates and charges.

Contact:

Nick Bruno, Board President
 (559) 326-2222
 nivk@ccdglc.com



SONOMA WATER

District Annexation Support & Financial Review

Sonoma Water manages eight sanitation districts and zones within Sonoma County. BWA has been the financial consultant for Sonoma Water for many years and is currently contracted to develop financial plans, rate studies, and capacity fee studies for all eight districts and zones. We are also providing financial analysis for the annexation

of South Park County Sanitation District into the City of Santa Rosa. The annexation will occur over a 5-year period and requires public outreach and wastewater rate adjustments to convert ratepayers from a fixed sanitation charge on the property tax roll to monthly wastewater bills based on volumetric use. BWA has developed financial models and reports, drafted public notices and participated in public meetings to assist these efforts.

Contact:

Lynne Rosselli, Administrative and Financial Services
(707) 524-3771
lynne.rosselli@scwa.ca.gov

**CITY OF ALAMEDA*****Capital Budget & Financial Plan***

Since 2014, BWA has assisted the City of Alameda with its annual Capital Improvement Plan and Budget. We compile all unrestricted fund balances, revenue projections and estimated project costs into a large budget spreadsheet that provides an overview of Capital Improvement Plan funding over a 5-year period. Projects included in the CIP range from parks & recreation to water, sewer, transportation and street cleaning. The comprehensive spreadsheet is then used to develop charts and tables for specific sectors within the City and inform planning efforts for the next fiscal year.

Contact:

Liam Garland, Public Works Director
(510) 747-7962
lgarland@alamedaca.gov

**SAN RAMON VALLEY FIRE PROTECTION DISTRICT*****Capital Asset Management Plan***

The SRVFPD provides fire protection services for areas in and around San Ramon, California, in Contra Costa County. The District hired BWA to perform a comprehensive capital asset management plan. This plan consisted of a complete inventory of capital assets of \$5,000 or greater, including site visits and visual inspections of asset conditions. Once the inventory was complete, BWA worked with staff to develop a capital improvement program for asset rehabilitation and replacement. Then the BWA/District staff team prioritized items and developed a balanced 20-year replacement schedule. BWA also developed a comprehensive asset financing plan to work within the District's tightening budget.

Contact:

Gloriann Sasser, Finance Supervisor
(925) 838-6668
gsasser@srvfire.ca.gov

**8.0 CONFLICT OF INTEREST STATEMENT**

The Planwest team has no known past, ongoing, or potential conflicts of interest that may result from working on this project. The Planwest team has no financial, business, or other relationship with any local or regional agencies within the Town of Windsor or Subsidiary Water District. Planwest Partners Inc. is currently under contract with Sonoma LAFCO to prepare the Timber Cove Water District MSR.

9.0 INSURANCE STATEMENT

As outlined in the RFP, Planwest will provide Sonoma LAFCO with certificates and original endorsements affecting the required insurance coverage prior to execution of a contract, including the following:

- A. Employer's umbrella liability insurance, with minimum coverage of \$1,000,000 per injury
- B. Commercial general liability insurance, in an amount of \$2,000,000 per occurrence and \$4,000,000 general aggregate (errors and omissions coverage)
- C. Automobile liability insurance, for any automobiles, with a minimum combined single limit coverage of \$1,000,000 per accident
- D. General Conditions Pertaining to Insurance

Such insurance will not be canceled or materially changed without thirty (30) days advance written notice and shall be maintained throughout the term of the contract and for a minimum of six months following termination and acceptance of all work under the contract.

Attachment A
Budget with Project Costs and Hourly Staff Rates

Sonoma LAFCO Town of Windsor and Subsidiary Water District MSR Preparation Draft Budget

	Principal Planner	Senior Planner	GIS Analyst	Associate Planner	Assistant Planner	Financial BWA (DD)	Financial BWA (AS)	Expense	Total
Rate	\$116	\$106	\$86	\$88	\$78	\$255	\$185		
Task 1. Data Collection and Review									
Review Prior MSRs		2.00		4.00	8.00				\$1,188.00
Review Online Information Sources		4.00	16.00	8.00	24.00		8.00		\$5,856.00
Coordination with City & Districts	2.00	8.00		10.00	16.00	4.00	8.00	452.60	\$6,160.60
Task 2. Service Evaluation and Determination									
Prepare District Profiles	2.00	8.00	8.00	24.00	32.00	2.00	16.00		\$9,846.00
District Staff Review	4.00	4.00		4.00	4.00				\$1,552.00
Administrative Draft MSR	4.00	12.00	16.00	32.00	40.00		8.00		\$10,528.00
Public Review Draft MSR	4.00	6.00	4.00	12.00	16.00	2.00	4.00	\$452.60	\$5,450.60
Track and Compile Comments		2.00		4.00	6.00		2.00		\$1,402.00
Task 3. Final Report and Adoption									
Prepare Final MSR	4.00	4.00	6.00	8.00	12.00	2.00	4.00		\$4,294.00
Present Final at Commission Meeting				8.00	2.00			\$458.40	\$1,318.40
Total Hours	20.00	50.00	50.00	114.00	160.00	10.00	50.00		
Total	\$2,320.00	\$5,300.00	\$4,300.00	\$10,032.00	\$12,480.00	\$2,550.00	\$9,250.00	\$1,363.60	\$47,595.60

cross check \$47,595.60

Mileage Arcata - Santa Rosa: 230 mi @ \$.58/mi	\$133.40
Mileage Arcata - Windsor: 220 mi @ \$.58/mi	\$127.60
Lodging Expense	\$250.00
Day Per Diem	\$75.00

Attachment B
Example Completed MSR
San Rafael Regional MSR (provided electronically)