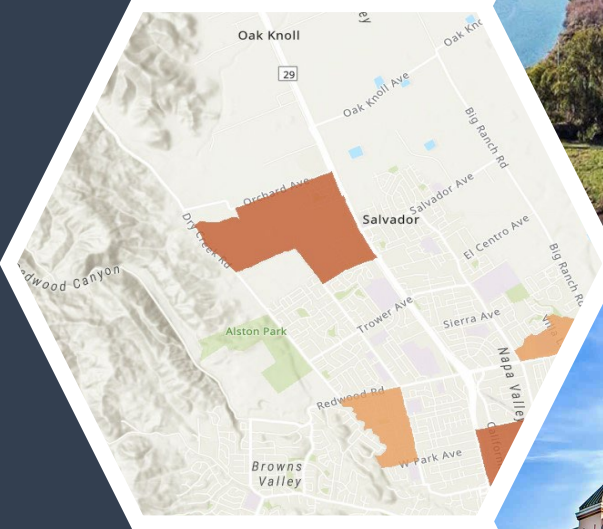


Proposal Submitted  
to Sonoma LAFCO

April 17, 2023



**Disadvantaged Unincorporated  
Communities  
Identification and Mapping Project**

# Table of Contents

<b>TABLE OF CONTENTS</b> .....	<b>1</b>
<b>COVER LETTER</b> .....	<b>2</b>
<b>FIRM OVERVIEW</b> .....	<b>3</b>
PLANWEST PARTNERS INC. ....	3
<b>TEAM QUALIFICATIONS</b> .....	<b>4</b>
KEY PERSONNEL & QUALIFICATIONS .....	4
<b>PROJECT EXPERIENCE</b> .....	<b>7</b>
<b>APPROACH AND SCOPE OF WORK</b> .....	<b>12</b>
APPROACH .....	12
SCOPE OF WORK .....	13
<b>BUDGET</b> .....	<b>15</b>
<b>TENTATIVE MSR SCHEDULE</b> .....	<b>16</b>
<b>INSURANCE</b> .....	<b>16</b>

## APPENDIX A - RESUMES

# Cover Letter

Mark Bramfitt, Executive Officer  
Sonoma LAFCO  
PO Box 1428  
Santa Rosa, CA 95404

April 17, 2023

Mr. Bramfitt,

Planwest Partners, Inc. is excited to present the following proposal for Disadvantaged Unincorporated Community (DUC) identification and mapping. Our team specializes in Local Agency Formation Commission (LAFCO) staffing services, Municipal Service Review (MSR) preparation, change of organization and reorganization applications and processing, and other LAFCO responsibilities. As such, we understand the importance of strong DUC policies and mapping that clearly identify areas of special concern throughout the county. Proper identification and mapping of these areas allows LAFCO to identify areas where there may be gaps in vital services, environmental justice concerns, or that may need special consideration when processing city boundary change applications.

Our team of LAFCO professionals is well versed in DUC requirements and understands the process for identifying these areas. Additionally, our GIS Manager, Jason Barnes, has over a decade of experience with GIS mapping, design, and demography services. He actively manages the boundary databases for Humboldt, Del Norte, Trinity, and Shasta LAFCOs; takes a lead role in evaluating growth and population projections, DUCs, and land uses within spheres and special study areas; and works with agencies as part of decennial census districting and redistricting efforts. In addition to our work with LAFCOs throughout the state, Planwest routinely develops Housing Elements for cities throughout northern California. Development of these documents involves robust demographic analysis and attention to detail in order to satisfy all the requirements set by the Governor's Office of Housing and Community Development (HCD). This has provided us with extensive experience obtaining and analyzing United States Census Bureau data and evaluating disadvantaged communities and legacy communities.

Together our team of LAFCO professionals, GIS specialists, and demographers has the knowledge and experience necessary to effectively conduct DUC identification and mapping for Sonoma LAFCO in an efficient and timely manner.

Sincerely,



Colette Santsche, AICP

Principal Planner & Partner  
Planwest Partners, Inc.

[colettem@planwestpartners.com](mailto:colettem@planwestpartners.com)

o: (707) 825-8260

c: (530) 227-6836

# Firm Overview

## PLANWEST PARTNERS INC.

Planwest Partners is a community planning consulting firm based in Arcata, CA with satellite staff in El Dorado County and Florida. We have been serving California communities since 1997. Planwest provides community, land use, environmental, economic, and transportation planning services in addition to LAFCO staffing services for four counties in northern California. We specialize in LAFCO staffing and support services and have prepared Municipal Service Reviews (MSR) and Sphere of Influence (SOI) updates for Sonoma, El Dorado, Humboldt, Shasta, Del Norte, Butte, Trinity, Mendocino, Solano, Marin, and San Diego LAFCOs. We are committed to working collaboratively with our clients and the community to deliver outcomes that promote sound growth, economic sustainability, and environmental stewardship.



Planwest is a California “C” corporation, small business that expanded ownership to include two employees, Vanessa Blodgett and Colette Santsche, in addition to founder George Williamson. As of January 1, 2021, Vanessa and Colette have combined company ownership, making Planwest a women-owned business. Planwest has assisted city, county, regional, and tribal governments; transportation planning agencies; special districts; school districts; non-profits; and private industry in achieving their specific goals. Our multi-disciplinary staff comprised of planners, economists, spatial analysts, technicians, and administrators offers a wide range of professional skills necessary to meet and often exceed our client’s diverse planning needs and expectations. Planwest provides a full range of planning services, including:

- Geographic Information Systems (GIS) Mapping and Data Management
- LAFCO contract services and special studies
- Municipal Service Reviews and Sphere of Influence Updates
- Plan for Services for changes of organization or reorganization
- Regional Services Planning, Consolidations, and Governance Models
- Community, General, and Specific Plans
- Strategic Plans and Visioning
- Community Outreach and Meeting Facilitation
- Environmental Planning Services – CEQA and NEPA Compliance
- Land Use and Community Plans
- Hazard Mitigation and Emergency Management Planning
- Grant Writing
- Project Management
- Site Selection, Design and Feasibility Studies

We pride ourselves on serving client needs, engaging the public in visioning and place-based strategies, providing concise and engaging work products, and implementing comprehensive planning programs that serve to maximize the potential for implementation based on available and potential resources. Planwest has computer software and in-house capabilities including Microsoft Office Professional suite, Adobe CS creative suite (Photoshop, Illustrator, InDesign), Esri Geographical Information Systems (ArcGIS Desktop) software, and Google Sketchup software.

# Team Qualifications

## KEY PERSONNEL & QUALIFICATIONS

The Planwest team includes professional planners, project managers, and a GIS manager with broad experience and technical expertise in overseeing LAFCO's planning and regulatory activities. Planwest's community services, land use, and economic planning experience offers a broad perspective when engaging Commissions, agencies, and stakeholders. We have included qualifications of our core project team below.

### **Colette Santsche, AICP**

#### **Principal/Partner/Project Manager**

Colette Santsche is a Principal Planner and Partner at Planwest Partners with over 13 years of experience in community, environmental and services planning. Since 2011, she has served as an LAFCo administrator and analyst, and now serves as executive officer for both Humboldt and Trinity LAFCos. During this time, she has processed over 35 boundary change applications, prepared a range of agency and service-specific MSR/SOI updates, and provides ongoing technical assistance to member agencies. More recently she has overseen the completion of regional MSRs for fire related districts, the formation of several community services districts and fire districts, processed consolidations and complex special district reorganizations, and prepared a range of city and special district MSR/SOI updates. She also provides technical assistance to the North Coast Resource Partnership for the development of grant applications on behalf of special districts in the region. She works closely and effectively with elected officials and public agency staff.

### *Colette Santsche, Principal/ Partner*

#### **EDUCATION**

*Cal Poly Humboldt*

B.S., Natural Resources Planning and Interpretation, 2009

#### **TRAINING/PROFESSIONAL AFFILIATIONS**

American Institute of Certified Planners (AICP), 2018 to present

Leading Organizational and Community Change, 2017

Humboldt Area Foundation, Cascadia Leadership Program, 2012

National Charrette Institute, Charrette System Certificate, 2011

### **John Miller**

#### **Principal Planner**

John Miller has nearly 28 years of experience working for and consulting to local government in land use and environmental planning, local government organization, and land use economics. Mr. Miller has worked as a long-range and project land use planner, analyst for a Local Agency Formation Commission, military base conversion project manager, consulting planner for local agency land use and environmental planning and land use economics, Tribal planner, and interim city manager. He has in depth knowledge of open-source GIS software and can create and manage shapefiles for countywide analysis. As a Senior Planner for Humboldt County, Mr. Miller helped prepared the General Plan Update for the county and prepared the disadvantaged community and legacy community analysis for all unincorporated areas. He served for 15 years as part of a small multi-disciplinary team

### *John Miller, Principal*

#### **EDUCATION**

*San Francisco State University*

B.A., Economics, 1993

#### **TRAINING/PROFESSIONAL AFFILIATIONS**

Office of the State Fire Marshal  
Fire Fighter 1 since 2013

Humboldt County Fire Safe Council  
Member 2018 - 2022

to address countywide fire services capacity, assisting in all aspects of preparing long-range expenditure and revenue projections, service level analysis, property tax exchange agreements, and developing new special taxes to support fire protection services. In addition, Mr. Miller has completed comprehensive plan- and project-level CEQA documents and local agency fiscal impact analyses.

**Jason Barnes**

**GIS Manager**

Jason Barnes will serve as the team GIS Manager and will take the lead in refining the methodology for identification of DUCs throughout Sonoma County. Jason has over 15 years of experience working as an analyst, technician, cartographer, programmer, web developer, 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 actively manages the GIS database for Humboldt, Trinity, Shasta, and Del Norte LAFCOs. As part of the LAFCO MSR/SOI update process, Jason takes a lead role in evaluating growth and population projections, DUCs, and land uses within spheres and special study areas. Jason is also a trained demographer and works with agencies as part of decennial census districting and redistricting efforts. He has been involved in activities involving many local consulting, non-profit, and federal agencies including the Bigfoot Trail Alliance based in Bayside, CA.

*Jason Barnes, GIS Analyst*

**EDUCATION**

*Cal Poly Humboldt*  
M.S., GIS, 2012

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

**TRAINING/PROFESSIONAL AFFILIATIONS**

Database Design Course, 2018

Bigfoot Trail Alliance Secretary, 2016-2020

ESRI Training Courses Member, ASPRS 2011 to Present

**Krystle Heaney, AICP**

**Senior Planner**

Krystle Heaney has nine 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 MSRs prepared for Marin LAFCo and has conducted several MSR/SOI updates for Humboldt and Shasta LAFCOs including a regional water services MSRs and city MSRs. Additional MSR experience includes Sonoma, San Diego, and most recently El Dorado and Sacramento LAFCOs. She has also attended workshops on MSR preparations and provides analyst and clerk services for Humboldt and Trinity LAFCOs which provides her with in depth knowledge of LAFCo policies and the Cortese-Knox-Hertzberg Act. Ms. Heaney's 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.

*Krystle Heaney, AICP, Senior Planner*

**EDUCATION**

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

**TRAINING/PROFESSIONAL AFFILIATIONS**

American Institute of Certified Planners,  
November 2020 to Present  
California Planning Roundtable  
Leadership Academy – 2022

AEP Intermediate CEQA Workshop – 2021  
AEP Advanced CEQA Workshop – 2020

CALAFCO-U: Deep Dive into MSRs – 2019

**Cosette McCave**  
**Planning Technician**

Cosette McCave is a recent graduate from Cal Poly Humboldt. She obtained her Bachelor of Science in Environmental Science and Management in May 2021. Since joining Planwest in the summer of 2021 she has assisted with multiple projects including preparation of MSR/SOI updates for Shasta, Del Norte, and Humboldt counties. She has also assisted lead staff with preparation of Humboldt Bay Harbor District permits and assisted with drafting a housing development fee waiver ordinance for Humboldt County. She has an understanding of basic water and wastewater systems and is able to utilize information from source documents to draft language that can be used in project descriptions and environmental resource background sections.

*Cosette McCave, Planning Technician*

**EDUCATION**

*Cal Poly Humboldt*  
B.S., Environmental Science and Management, 2021

**TRAINING/PROFESSIONAL AFFILIATIONS**

Board Member at Friends of the Arcata Marsh, 2019-2021

Humboldt Bay Nuclear Waste Study for HSU  
Capstone Course with Humboldt Bay Harbor District

# Project Experience

Planwest conducts several MSR/SOI updates every year for multiple LAFCos throughout the state. We are also involved in general plan and housing element updates, demography services, and other land use planning projects. Below are some examples of our work over the last 3+ years.

## GIS MAPPING AND DATABASE MANAGEMENT

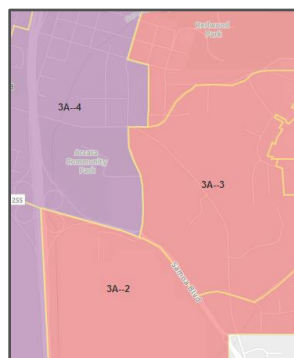
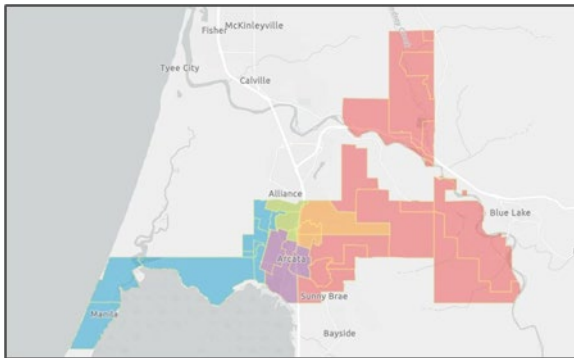
### *Otay Water District Director Division Area Review and Mapping*

Planwest Partners assisted Otay Water District with redistricting for the 2020 Decennial Census. The District is located near the southern California border and has an estimated population of approximately 225,000. Included analysis of existing populations within Division boundaries, adjusting boundaries to better align with census block boundaries, and consideration of minority-majority Divisions in accordance with current state law. The process also included three public hearings to gather input of map options and to adopt the final map for the District.

**Contact:** Adolfo Segura, Chief of Administrative Services  
**Phone:** (619) 670-2296  
**Email:** [adolfo.segura@otaywater.gov](mailto:adolfo.segura@otaywater.gov)  
**Completion:** April 2022

### *Arcata School District Census Districting and Trustee Area Mapping*

Planwest Partners developed Trustee Areas for the Arcata School District election process. Multiple Trustee Area options were created by using U.S. Census Bureau block level demographic data, with a demographic profile breakdown for each. The three options were presented at a School Board meeting where the final option was chosen based on what the board felt best captured the demographics equally. The final Trustee Areas were integrated within an online interactive map, which allows board members and the public to visualize where these areas exist. Users can type in their address to see which Trustee Area they may reside in. The interactive map can be seen here: <https://arcg.is/0G8TT5>.

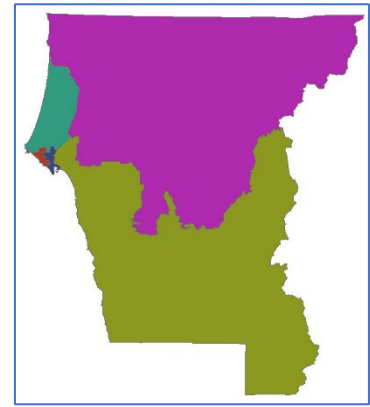


**Contact:** Luke Biesecker, Superintendent Arcata School District  
**Phone:** (707) 822-6589  
**Email:** [lbiesecker@arcatasd.org](mailto:lbiesecker@arcatasd.org)  
**Completion:** 2020



### ***Del Norte School District Census Districting and Trustee Area Mapping***

Planwest Partners developed Trustee Areas for the Del Norte School District in northern California. Del Norte School District transitioned from a hybrid at-large election method to a five-trustee district-based election. Planwest assisted the district in creating five trustee areas that met requirements for both California and Federal Voting Rights Acts, utilizing Census population and demographic data. Planwest presented multiple options at the district board meetings in which the board voted to approve the option that best represented the district.



**Contact:** Ryan Tung  
**Phone:** (925) 953-1620  
**Email:** rtung@lozanosmith.com  
**Completion:** 2022

## **HOUSING ELEMENT DEMOGRAPHIC ANALYSIS AND PREPARATION**

### **CITY OF MT. SHASTA**

#### ***City of Mt. Shasta Housing Element***

Planwest is leading a team that is currently assisting the City of Mt. Shasta with their 6th cycle Housing Element Update. The City is interested in programs that make it easier to develop housing and increase the variety of housing types in their community through programs that are appropriate, and that provide realistic and creative solutions to the housing challenges facing Mt. Shasta residents at all income levels. Key will be programs seeking updates to some of the zoning rules that apply in residential zones and to some types housing. To ensure the Housing Element Update incorporates the range of housing issues from a variety of perspectives, Planwest identified community stakeholders and is conducting interviews, including with representatives of special populations. Planwest is updating the City's demographic and housing profiles to assess housing need. Planwest continues to coordinate this project and conducted a public workshop with the City Council.

**Contact:** Todd Juhasz, City Manager  
**Phone:** (530) 926-7510  
**Email:** tjuhasz@mtshastaca.gov  
**Completion:** In progress



### **CITY OF EUREKA**

#### ***Housing Element Update 6th Cycle (2019-2027) – Technical Assistance and Environmental Compliance***

Compiled Bureau of the Census, American Community Survey (ACS), Comprehensive Housing Affordability Strategy (CHAS), demographic, housing characteristic, household, employment, and income statistics for the City of Eureka Housing Element Technical Appendix. Conducted site inventory analysis for developable parcels based on HCD criteria methodology.

Writing and editing City of Eureka Housing Element Technical Appendix. Refined site inventory analysis for developable parcels based on HCD criteria methodology. Provided residential housing density analysis for accessory dwelling units (ADU) and multi-family parcels. Other tasks performed: Weekly check-in phone calls with City staff; GIS mapping and analysis; prepared data charts and tables. Planwest also conducted environmental review in compliance with CEQA for the draft Housing Element.

**Contact:** Rob Holmlund, AICP, former Community Development Director  
**Phone:** (707) 443-0801 ext. 122  
**Email:** rholmlund@humboldtby.org  
**Completion:** 2019

## **SONOMA LAFCO MSR PREPARATION**

### ***Timber Cove County Water District***

Planwest Partners was contracted by Sonoma LAFCO to conduct a MSR/SOI Update and preliminary rate analysis for the Timber Cove County Water District. This MSR was requested by homeowners in the District who were concerned about the governance and financial management of the District. Planwest staff was able to gather information on the District from web resources and through coordination with District staff. Through our independent and impartial analysis, we were able to document prior issues with District management and the current activities the District is taking to correct those issues. This resulted in specific recommendations for the District which included a follow-up report on District finances after the completion of several outstanding audits. (<http://sonomalafo.org/Projects-and-Proposals/Timber-Cove-MSR-Project-Sept-2020/>)

**Contact:** Mark Bramfitt, Sonoma LAFCO Executive Officer  
**Phone:** (707) 565-2577  
**Email:** Mark.Bramfitt@sonoma-county.org  
**Completion:** Oct 2020

## **EL DORADO LAFCO MSR PREPARATION**

### ***Small to Medium Water and Wastewater Service Providers MSR/SOI Update***

Planwest is currently working with El Dorado LAFCo staff on preparation of the Small to Medium Water and Wastewater Service Providers MSR/SOI Update. This update provides detailed service review for Georgetown Divide Public Utility District, South Tahoe Public Utility District, and Grizzly Flats Community Services District. Project tasks have included coordinating with agency staff on development and review of draft agency profiles, assessment of the financial standing for each agency, and coordination with the El Dorado LAFCo subcommittee on review of the draft document. During preparation of the MSR, the Caldor fire severely impacted Grizzly Flats CSD, and South Tahoe PUD was impacted by both the Tamarack and Caldor fires. This required additional coordination with both districts to assess potential long-term impacts from the fires.

**Contact:** Erica Sanchez, El Dorado LAFCo Deputy Executive Officer  
**Phone:** (530) 295-2707  
**Email:** ESanchez@edlafco.us  
**Completion:** Fall 2022



## TRINITY LAFCO MSR PREPARATION

### ***Trinity PUD MSR/SOI Update***

Planwest, as Trinity LAFCo staff, recently prepared the Trinity Public Utility District MSR/SOI update. Trinity PUD is the owner and operator of hydroelectric systems along the Trinity River and distributes power to approximately 12,000 consumers in a 2,200 square mile area in Trinity County. Under the 1955 Trinity River Division Act, Trinity County residents are entitled to 25 percent of energy produced at the plants, at cost. As part of the MSR/SOI update, Planwest reviewed the District's entitlement relative to the total annual retail load and peak usage of the electric system. Planwest also documented the District's efforts to reduce fire risk to the surrounding communities and public lands, as well as to increase electric reliability to maintain critical services in local communities. With 85 percent of Trinity County served by TPUD, Planwest documented the electric service grid outside of the District's service area and developed MSR and SOI determinations based on the District's present and planned capacity and level of services.

**Contact:** Paul Hauser, General Manager  
**Alt Contact:** Sarah Sheetz, Administrative Services Manager  
**Phone:** (530) 623-5536  
**Email:** phauser@trinitypud.com  
**Completion:** 2021



### ***Weaverville CSD MSR/SOI Update***

Planwest, as Trinity LAFCo staff, recently prepared the Weaverville Community Services District MSR/SOI update in 2020-21. Weaverville CSD provides water storage, treatment, and distribution to 3,554 customers in Weaverville and adjacent communities, with a total of 1,640 water service connections. As part of this MSR/SOI update, a SOI reduction was evaluated and approved to follow parcel lines and avoid 341 acres of open space designated territory that would not require the extension of urban services. Planwest worked with the District to evaluate SOI changes relative to planned uses, county land use policy, and anticipated need for water services.

**Contact:** Tim Kasper, General Manager  
**Phone:** (530) 623-5051  
**Email:** wcscd@weavervillecsd.com  
**Completion:** 2021

## HUMBOLDT LAFCO MSR PREPARATION

### ***Big Lagoon CSD MSR/SOI Update***

Big Lagoon CSD is currently responsible for providing potable water service throughout the District and is primarily funded through user fees. Planwest worked closely with the district to document capital improvements to the system including increased storage capacity to meet CAL FIRE recommended fire flow storage amounts. Planwest also proposed changes to the SOI to better align the SOI with parcels receiving water service outside the District's boundary. ([https://humboldtlafo.org/wp-content/uploads/Big-Lagoon-MSR\\_Adopted-3-17-21-1.pdf](https://humboldtlafo.org/wp-content/uploads/Big-Lagoon-MSR_Adopted-3-17-21-1.pdf))

**Contact:** William Wenger  
**Phone:** (707) 677-2008  
**Email:** bill@biglagooncsd.com  
**Completion:** 2021



### ***City of Fortuna MSR/SOI Update***

As Humboldt LAFCo staff, Planwest prepared the 2021 City of Fortuna MSR/SOI Update. Fortuna is a rural city located on the banks of the Eel River with a population of approximately 12,000. The City offers a range of municipal services including water, wastewater, street maintenance, police, and parks and recreation. Planwest worked closely with City staff to accurately document the current state of city services including recent impacts experienced from the Covid-19 pandemic such as fluctuating income, budget concerns, and changes to recreation opportunities. Most notably the MSR discussed the City's planned relocation of wastewater dispersal fields, updates on planned police department renovations, and traffic concerns in the southern portion of the City. In addition to standard services, Planwest also included a discussion of emergency preparedness and a tribal land acknowledgement to honor the area's original inhabitants. ([https://humboldtlafo.org/wp-content/uploads/Fortuna-MSR-Adopted\\_1-20-21.pdf](https://humboldtlafo.org/wp-content/uploads/Fortuna-MSR-Adopted_1-20-21.pdf))

**Contact:** Liz Shorey, Deputy Director of Community Development  
**Phone:** (707) 725-1408  
**Email:** [lshorey@ci.fortuna.ca.us](mailto:lshorey@ci.fortuna.ca.us)  
**Completion:** 2021



### ***City of Arcata and Jacoby Creek CWD MSR/SOI Updates***

Planwest recently prepared the City of Arcata and Jacoby Creek County Water District MSR/SOI updates. The City of Arcata provides a wide range of services including water, wastewater, law enforcement, street maintenance, parks and recreation, and other miscellaneous services. Most notably, the City has an agreement with the Jacoby Creek CWD for management, control and maintenance of the District's water system until the outstanding debt from a Davis-Grunsky loan obtained to construct the distribution system is fully paid off. Planwest staff worked with the City and District to document the shared services agreements and included conditions on the District SOI to include a plan of succession for when payoff of the Davis-Grunsky loan occurs. Additionally, the City operates a unique wastewater treatment facility on Arcata Bay and includes the use of a marsh system to treat wastewater. Many of the components of the facility are nearing the end of their useful life and the City is in the process of planning and implementing updates. Planwest was able to document planned facility upgrades in relation to expected demand in addition to highlighting City strategies for accommodating sea level rise in project plans.

([https://humboldtlafo.org/wp-content/uploads/Arcata-MSR\\_Adopted-11-18-20.pdf](https://humboldtlafo.org/wp-content/uploads/Arcata-MSR_Adopted-11-18-20.pdf))

([https://humboldtlafo.org/wp-content/uploads/Jacoby-Creek-MSR\\_Adopted-9-16-2020.pdf](https://humboldtlafo.org/wp-content/uploads/Jacoby-Creek-MSR_Adopted-9-16-2020.pdf))

**Contact:** David Loya, Community Development Director  
**Phone:** (707) 825-2045  
**Email:** [dloya@cityofarcata.org](mailto:dloya@cityofarcata.org)  
**Completion:** 2020



# Approach and Scope of Work

The Planwest team is well qualified and committed to identifying and mapping DUCs for Sonoma LAFCO. We understand the importance of identifying DUCs in close proximity to cities and throughout the county as a whole. Disadvantaged communities may have capacity challenges and gaps in vital services such as water, wastewater, and fire protection/emergency response. By accurately identifying DUCs to the smallest community designation possible, such as census block groups, LAFCO can ensure that these areas are considered in future boundary change proceedings and receive the necessary services for the community to thrive.

## APPROACH

Planwest Partners will review and update the methodology used by California Association of Local Agency Formation Commissions (CALAFCO) to analyze the most recent census household income data to determine potential Disadvantaged Unincorporated Communities (DUC) within Sonoma County, specifically to be compliant with Senate Bill 244 which requires LAFCOs to identify DUCs when making municipal service review determinations. Part of this process will require acquisition of Sonoma County spatial data including but not limited to:

- U.S. Census Decennial and American Community Survey data
- Potential local sources of demographic and/or income data
- LAFCo boundaries (special districts, service areas)
- City boundaries and data (zoning, land use, parcels)
- Sonoma County and city General Plan data (zoning, land use, parcels, etc.)

The U.S. Census provides income data at the block group level and therefore the majority of our analysis will be performed using a state-wide block group dataset to locate census areas under 80% of the statewide median household income. All census areas under the statewide MHI will be selected for potential DUC status. At the direction of LAFCO staff and Commissioners, we can also identify areas that fall below 80% of the Sonoma County MHI which is higher than the State MHI and may result in identification of marginally disadvantaged communities in the county.

To help identify inhabited unincorporated areas of the county, Planwest will use city boundary data verified through the Bureau of Equalization tax rate areas along with U.S. Census block level population data. Another approach is to utilize registered voter or Citizen Voting Age Population (CVAP) data from the county or the California Redistricting Commission's statewide database. These data sources will better aid in determining populated areas much more accurately than larger Census block groups. Any areas outside of city limits but above the selected population threshold can be used in conjunction with the selected income areas to determine DUCs.

Additional analysis of city and special district boundaries will help determine DUCs with potential service gaps in water, sewer, fire or other provided services. This will allow Sonoma County to focus resources on those communities in greater need. The resulting maps will clearly identify DUCs at the block group level throughout Sonoma County in addition to highlighting areas of special concern where potential service gaps occur.

## SCOPE OF WORK

### **Task 1 – Kick-Off and Project Management**

Planwest staff will prepare for and hold a virtual kick-off meeting with LAFCO staff to confirm the scope of work and overall project timeline. Planwest will also review data needs and potential contacts that may be able to provide additional information for DUC identification. After the initial kick-off meeting, Planwest will coordinate a stakeholder meeting with city and county representatives to inform them of the project and collect input on the proposed approach noted above. During the course of the project, Planwest will regularly update the LAFCO Executive Officer on the status of the project and request staff review and comment on specific aspects of the project as necessary.

### **Task 2 – Data Collection and Methodology Refinement**

Planwest will gather all available income and population data for the county and its nine cities. Data may include the following:

- American Community Survey 5-year Estimates
- US Decennial Census Data (Population and Housing Estimates)
- City and County General Plan and Housing Elements and Income Estimates
- Special District or other Community Specific Income Data
- Boundaries and SOIs for Cities Special Districts
- Sonoma County Registered Voter Precinct Data
- Board of Equalization Tax Rate Areas
- Location of Independent Service Providers (e.g., private water companies)

Once all available data has been gathered, Planwest will refine the proposed methodology based on the information available and feedback received during the initial stakeholder meeting. This may include adjusting income thresholds, DUC size (e.g., block groups, blocks, subdivisions, etc.), applicable service metrics, distance from a city boundary, or other variables. The final methodology will be reviewed with the LAFCO Executive Officer before being implemented.

### **Deliverables:**

- Written methodology for identification of DUCs throughout the county
- Annotated works cited for data sources

### **Task 3 – DUC Identification and Mapping**

Based on the methodology refined in Task 2, Planwest will utilize the available data to identify DUCs within Sonoma County. Particular attention will be given to the identification of communities adjacent to Santa Rosa, Cloverdale, and within the Sonoma Valley. Initial results will be provided to LAFCO staff for review and discussion. Based on feedback provided by staff, Planwest will revise the DUCs identified before further review by cities and the Commission. We will coordinate a second stakeholder meeting to present the initial results and obtain feedback from the cities and county. Following the stakeholder meeting, the DUC findings will be presented at a regularly scheduled commission meeting in order to seek input from the Commission and the public. For each DUC, the total population, estimated MHI, and available services will be provided. Individual DUC maps will be prepared for each city in the county and for areas away from city limits. Additionally, Planwest will work with county GIS staff to ensure that data

layers created through this project can be easily incorporated and shown on the online county GIS interactive map.

Deliverables:

- Explanation of how each DUC area was identified including population, estimated MHI, and available services
- DUC map for each of the nine cities and the Sonoma Valley
- County DUC maps as necessary (separated by major region)
- GIS shapefiles for use with online map
- Attendance at LAFCO Commission meeting to present initial findings

**Task 4 – DUC Policy Development**

Planwest will research DUC policies from other LAFCOs, cities, counties, and CALFACO. Based on this research, Planwest will draft DUC policies for Sonoma LAFCO such as what qualifies an area as a DUC, inclusion of additional information in MSRs for DUCs, annexation considerations for cities and special districts, and periodic review and identification of DUCs.

Deliverables:

- Draft DUC policies

**Task 5 – DUC Identification Study Document**

Planwest will utilize the data and analysis conducted in the prior tasks to develop a draft document that details the methodology utilized for identification of DUCs throughout the county, provides an overview of DUCs related to each city, and provides recommendations for DUC policies that can be utilized by Sonoma LAFCO. Planwest will provide an initial administrative draft to LAFCO staff for review comment. Input received by staff will be incorporated into a public draft for review and comment by the Commission and any interested stakeholders including the nine cities. The public draft will be presented at a regularly scheduled commission meeting. Comments and recommendations received will be reviewed and incorporated into the document where appropriate. A final draft of the study, including associated appendices and map book, will be prepared for approval by the Commission.

Deliverables:

- Administrative Draft DUC Identification and Mapping Study
- Public Draft DUC Study
- Final DUC Study and Map Book

# Budget

Based on the above tasks and proposed project schedule below, Planwest proposes to conduct the DUC identification and mapping project for a total budget not to exceed \$31,930. A breakdown of project costs including hourly rates is provided below. The total cost includes in-person attendance at two commission meetings to gather input from commissioners on initial findings and to present the final report/ maps.

## Planwest Partners - Sonoma LAFCo DUC Identification Cost Proposal

Task	Planwest				Expense	Total
	Principal Planner	Senior Planner	GIS Manager	Planning Technician		
<b>Rate</b>	\$150	\$130	\$110	\$85		
<b>Task 1 - Kick-Off and Project Mgmt</b>						<b>\$6,990.00</b>
Kick-Off	6.00		6.00			\$1,560.00
Stakeholder Meeting	6.00		6.00	2.00		\$1,730.00
Project Management	10.00		20.00			\$3,700.00
<b>Task 2 - Data Collection and Methodology</b>						<b>\$4,740.00</b>
Data Collection			20.00	16.00		\$3,560.00
Methodology Refinement	2.00		8.00			\$1,180.00
<b>Task 3 - DUC Identification and Mapping</b>						<b>\$8,580.00</b>
Identification			40.00	10.00	\$500.00	\$5,750.00
Stakeholder Meeting	6.00		6.00	2.00		\$1,730.00
Map Book			10.00			\$1,100.00
<b>Task 4 - DUC Policy Development</b>						<b>\$5,460.00</b>
Policy Research	4.00	4.00	8.00	4.00		\$2,340.00
Policy Drafting	8.00	8.00	8.00			\$3,120.00
<b>Task 5 - DUC Identification Study Document</b>						<b>\$9,160.00</b>
Draft Study and Presentation	16.00	8.00	16.00	8.00		\$5,880.00
Final Study	8.00	4.00	8.00	8.00		\$3,280.00
<b>Total Hours</b>	<b>66.00</b>	<b>24.00</b>	<b>156.00</b>	<b>50.00</b>	<b>500.00</b>	
<b>Total Cost</b>	<b>\$9,900.00</b>	<b>\$3,120.00</b>	<b>\$17,160.00</b>	<b>\$4,250.00</b>	<b>\$500.00</b>	<b>\$34,930.00</b>



## Tentative MSR Schedule

Timing of each work task is contingent on authorization by May 15, 2023. A tentative timeline is provided below.

TASK	DESCRIPTION	COMPLETION DATE
1	Kick-Off and Project Management	May/June 2023
2	Data Collection and Methodology	June/July 2023
3	DUC Identification and Mapping	July/Aug 2023
4	DUC Policy Development	Aug/Sept 2023
5	DUC Identification Study Document	Sept/Oct 2023

## Insurance

Planwest will maintain during the term of the project the following general and professional liability insurance in the following amounts:

- Commercial General Liability: \$1,000,000 per Occurrence and \$2,000,000 aggregate coverage.
- Business Automobile Insurance: \$1,000,000 combined single limit per accident.
- Workers Compensation Insurance: \$1,000,000 per accident for bodily injury or disease.
- Errors and Omissions Professional Liability Insurance: \$1,000,000 per claim or per occurrence.

Prior to commencing services, Planwest will furnish certificates of insurance showing the coverage required above and any additional coverage as requested. An additional endorsement will be added to General Liability Insurance for “separation of insureds” or “severability” as requested in Attachment 1 to the RFP.

# Colette Santsche

Partner/Principal Planner, AICP



Colette Santsche is a certified planner and partner at Planwest Partners with over ten years of experience working with business, nonprofits, government, and community efforts. Through her involvement with Local Agency Formation Commissions, Colette has experience navigating complex boundary change proposals and reorganizations that require a high level of involvement from affected agencies, stakeholders and members of the public. Her interest in community and economic development and organizational change management has expanded her involvement in strategic planning and outreach strategies. She has experience administering surveys, conducting interviews, and facilitating outreach activities to engage a variety of stakeholders and project partners.



## Relevant Experience

- **Local Agency Formation Commission (LAFCo) Contract Staffing Services.** *Humboldt and Trinity LAFCos.* Serves as Executive Officer for Humboldt and Trinity LAFCos. Conducts special studies including municipal service reviews and sphere of influence updates involving inter-agency coordination; prepares agendas and staff reports for Commission meetings; and implements policies and procedures for carrying out LAFCo functions. Oversees application and petition processing and analysis involving changes of governmental organization and reorganization, such as district formations, annexations, powers activation, and service extensions. Represents LAFCo at stakeholder meetings and makes presentations to LAFCo and other local governments at public hearings.
- **Regional Fire Services Municipal Service Reviews and Technical Assistance.** *Humboldt LAFCo.* Prepared a series of regional fire services municipal service reviews that included over 45 fire related districts and volunteer fire companies to identify shared trends relating to the adequacy, capacity, and cost of providing fire protection services in Humboldt County. Continues to participate in meetings of the Board of Supervisors Fire Services Ad Hoc Committee to address service and funding needs, property tax sharing recommendations, policy changes, and identification of priority areas for annexation or consolidation.
- **Humboldt Bay Peninsula Services Study.** *Humboldt LAFCo.* Prepared a services study to determine service needs and reorganization alternatives for service providers on the Humboldt Bay Peninsula. Conducted stakeholder interviews and facilitated a stakeholder meeting to inform and recommend a preferred governance option. Ultimately, a reorganization application was submitted to LAFCo that included formation of a community services district as successor agency, an election process, technical financial studies, and final asset transfer agreements.

## EDUCATION

Humboldt State University, CA  
B.S., Natural Resources Planning and Interpretation, Humboldt State University, 2008

## TRAINING/PROFESSIONAL AFFILIATIONS

American Institute of Certified Planners (AICP), 2018  
HSU Leading Organizational and Community Change Courses, 2017  
Humboldt Area Foundation, Cascadia Leadership Program, 2012  
National Charrette Institute, Charrette System Certificate, 2011  
Toastmasters, Former Area Governor  
North Bay Rotaract, Charter Member

- **Rio Dell Fire Protection District Annexation/Consolidation.** *Humboldt LAFCo.* Assisted with technical assistance and coordination efforts between four different agencies which culminated in a consolidation proposal through the strategic use of Annexation. The action allowed the Rio Dell Fire Protection District to annex areas primarily served by the Scotia, Shively, and Redcrest Volunteer Fire Companies, and included the divestiture of fire protection powers by the Scotia Community Services District. The operations of the four fire departments were officially merged into one efficient, effective, and sustainable emergency services system.
- **East Plumas County Fire Reorganization.** *City of Portola.* Currently serving as Project Manager for a financial feasibility study that will result in a LAFCo application and election process for a new fire protection district formation effectively consolidating fire services provided by Beckwourth Fire Protection District, Sierra Valley Fire Protection District, City of Portola, and Gold Mountain Community Services District. The new fire protection district would be funded by property taxes and a new special tax that would require 2/3rds voter approval.
- **Comprehensive Economic Development and Tourism Strategy.** *Yurok Tribe.* The Yurok Tribe secured funding from the U.S. Economic Development Administration (EDA) to conduct a Comprehensive Economic Development Strategy (CEDS) and a Tourism Investment Strategy planning process. Included CEDS Working Group meetings, community meetings, and stakeholder interviews.
- **North Coast Resource Partnership.** *West Coast Watershed.* Serves as NCRP Consultant to provide technical assistance and support for several projects including: Regional Forest and Fire Capacity planning efforts outlined in the block grant between the NCRP and the California Department of Conservation, Humboldt Area Foundation (HAF) grant capacity assessment and planning, and NCRP disadvantaged community technical assistance and proposal support for DWR drought funding and Proposition 1 Integrated Regional Water Management (IRWM) Implementation Round 2 funding. As part of the fire capacity assessment and planning, currently overseeing a detailed needs assessment of all Tribal fire response programs, Tribal communities, small rural fire departments and protection districts via interviews, meetings, polls and surveys in the Humboldt (including Karuk Tribal territory that overlaps with Siskiyou County), Del Norte, and Trinity counties.
- **AEDC Strategic Plan Update.** *Arcata Economic Development Corporation.* The Strategic Plan included interviews, online surveys, and focus groups with financial partners, community leaders, and clients. Conducted a day-long Board/Staff Retreat to clarify foundational principles, reflect on the challenges and successes, and identify implementation actions for the future stability and growth of the organization.
- **Lost Coast Brewery Facility.** *Lost Coast Brewery, Eureka CA.* Served as project manager for the Lost Coast Brewery project, which included a General Plan Amendment, Zone Reclassification, Text Amendment, Conditional Use Permit, and Lot-Line Adjustment for a new craft brewery facility in Eureka. Led a team of consultants to complete special studies for the project site and prepared an Initial Study and Mitigated Negative Declaration for which the City served as Lead Agency.
- **2030 General Plan Update.** *City of Fortuna.* Assisted with policy document review proceedings and program environmental impact report preparation for the Fortuna General Plan Update. Supported planning commission and city council review of goals, policies and implementation programs for economic development, community design, transportation, natural and cultural resources, recreation and open space, public facilities, and health and safety elements.

# JOHN MILLER

Principal Planner



John Miller is a Principal Planner with nearly 28 years of experience working with local governments in California, including long range and project land use planning, fire services planning, and economic development and military base conversion. Previously, John served as an analyst for the Sacramento Local Agency Formation Commission. In addition, John was also a volunteer firefighter for a fire protection district for over 14 years, with extensive training and leadership roles as firefighter, apparatus operator, training officer, and Assistant Chief.

John's community services, land use, and economic planning experience offers a broad perspective when engaging organizations, agencies and stakeholders in developing capacity building and implementation strategies. He has both principal and project management experience that is tailored to the unique needs of communities served.

## Relevant Project Experience

- **Local Government**

Served in various roles in local and Tribal governments for approximately 22 years, including as interim city manager, long range and project land use planning, economic development analyst, military base conversion project manager, and Local Agency Formation Commission analyst.

- **Land Use, Environment Planning, & Economics**

  - **Consulting**

Worked as a consultant to local governments for approximately six years in land use and environmental planning, land use economics, and economic development, preparing land use plans and zoning regulations, environmental review, economic development strategic planning, planning services, fiscal impact analyses, housing market studies.

- **Fire Services Support**

Played a central role in the Humboldt County's Fire Services Planning Team and provided technical support in the successful formation of three fire protection districts, the merger of a fire protection district and three volunteer fire companies not associated with a local agency, and the annexation of thousands of acres of inhabited land to fire-related districts as well as ongoing planning assistance to numerous fire-related districts seeking to improve service delivery.

- **Infrastructure, Services & Hazards Expertise**

Served as infrastructure and services lead for Humboldt County Planning, managing the preparation of a comprehensive countywide review and report on water, wastewater, transportation, fire protection, and park services for the General Plan Update and as lead author for the new Community Infrastructure and Services Element for the General Plan. Relating to hazard, served as the planning lead in airport land use compatibility planning, member of the Humboldt County Fire Safe Council, and member of the California Geological Survey Tsunami Technical Advisory Panel.

- **Project Management**

Managed the planning, design, and Coastal Zone approval of the Samoa Wastewater Treatment Project.



## EDUCATION

San Francisco State University  
B.A., Economics, 1993

## TRAINING/PROFESSIONAL AFFILIATIONS

Office of the State Fire Marshal  
Fire Fighter 1 since 2013

Humboldt County Fire Safe  
Council, Member 2018 - 2022

Mr. Barnes, Geographical Information Systems (GIS) Analyst, 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. Mr. Barnes moved to Humboldt County in 2006 to start his higher education at Humboldt State University. For the last ten years, 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.



#### Relevant Project Experience

- **City of Eureka Housing Element Update, Technical Appendices**  
Compiled Bureau of the Census, American Community Survey (ACS), Comprehensive Housing Affordability Strategy (CHAS), demographic, housing characteristic, household, employment, and income statistics for the City of Eureka Housing Element Technical Appendix. Conducted site inventory analysis for developable parcels based on HCD criteria methodology.
- **Humboldt Waste Management Authority (HWMA).**  
Analyzed complex routing scenarios for food waste diversion for a potential bio-digester project in Eureka, California. This project looked at multiple routing scenarios utilizing route optimization, and waste collection vehicle options as viable solutions for a city-wide food diversion project.
- **Humboldt Transit Authority (HTA).**  
Helped create the Humboldt County Transportation Services Guide for public transit and human services transportation for the Redwood Transit System (RTS), Eureka Transit Service (ETS), Arcata and Mad River Transit System (AMRTS), Blue Lake Rancheria Transit System (BLRTS), Klamath-Trinity Non-Emergency Transportation (KT-NET), and Trinity Transit.
- **Hiking Humboldt Volumes 1 & 2.**  
Cartography for over 150 hiking maps for Hiking Humboldt Volumes 1 & 2. These books highlight familiar favorites, hidden gems, and unexpected adventures across Humboldt County. Each map is custom to provide aesthetics and clarity to complement each hike description, trail data, and tips for the hiking in the region.
- **Shasta County Local Agency Formation Commission (LAFCo) Fire Service Analysis.**  
Planwest Partners provides contract staffing services to Shasta LAFCo. A fire district analysis was conducted looking at fire station response times, service areas, and route optimization.
- **Yosemite National Park Search and Rescue Cost Surface Analysis**  
Created a model for a complex cost surface analysis for foot traffic travel times across the wilderness areas of Yosemite National Park. The model would utilize a last known location of a lost hiker, and create temporal travel time areas based on attributes such as terrain type, difficulty, hiker age, condition, etc.

#### 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  
2008-Present

Krystle Heaney is a Senior Planner for Planwest and provides support services for numerous LAFcos throughout the state from her location in Markleeville, CA. She currently provides clerking services for Humboldt LAFco which includes processing service extension and boundary change applications in addition to conducting regular MSRs for cities and special districts. She also assists with MSRs for numerous other LAFcos including Shasta, Sonoma, Trinity, El Dorado, Marin, Contra Costa, and San Diego.

Krystle also provides environmental planning services for LAFcos and other Planwest clients. She is well versed in CEQA regulations and stays up to date on current practices. She recently prepared Addendums for an out of area service request and a city boundary change in Humboldt County. She has worked collaboratively with local governments and districts, State and federal regulatory agencies, and community groups on a variety of projects including CEQA environmental review, coastal development permitting requirements, waste discharge requirements documentation, and prohibited pesticide use exemption applications. Due to this experience, she is well-versed in the environmental analysis processes, permitting, and community engagement activities that coincide with LAFco processes.



### Relevant Project Experience

- Humboldt LAFco Clerking and Analyst Services  
Krystle is the current clerk for Humboldt LAFco and regularly processes requests for information, out of boundary service requests, and boundary change applications. She also oversees the preparation of municipal service reviews for cities and agencies throughout the county. Recent MSRs include the City of Arcata, City of Fortuna, City of Trinidad, and several small community services districts supplying water and wastewater services to area residents such as Manila CSD.
- Shasta LAFco Municipal Service Reviews  
Krystle has been responsible for collecting data and drafting agency profiles for community services districts, community service areas, and mosquito abatement districts in Shasta county. Services reviewed include water, wastewater, flood control, and mosquito abatement activities. These MSRs have included regular contact with agency and county staff to collect information and review draft documents.
- Sonoma LAFco Municipal Service Reviews  
Krystle managed the preparation of the Timber Cove County Water District MSR. This review was completed at the request of the District and included a water services rate comparison analysis. Krystle coordinated with District staff and board members, participated in internal coordination meetings, and presented the draft document to the commission during the public hearing.
- San Diego LAFco Municipal Service Reviews  
San Diego LAFco retained Planwest to conduct several MSRs include the City of Poway and Ramona Municipal Water District MSR/SOI updates. Krystle was responsible for development of the draft Ramona MWD MSR which include a review of water, wastewater, fire/ emergency response, and parks and recreation services. This included coordination with District staff, CalFire, and a non-profit organization responsible for overseeing park services. Krystle provided analysis of all services provided by the District and identified service and financial trends.

### EDUCATION

CSU Sacramento  
*B.A. – Physical Geography, 2013*

### TRAINING/PROFESSIONAL AFFILIATIONS

California Planning Roundtable Leadership Academy – 2022

American Institute of Certified Planners  
*Certified November 2020*

American Planning Association  
*Member Since 2019*

AEP Intermediate CEQA Workshop – 2021

AEP Advanced CEQA Workshop – 2020

CALAFCOU: Deep Dive into MSRs – 2019

Cosette McCave is a Planning Technician for Planwest and provides support services for numerous LAFCOs throughout the state. She currently conducts work on MSRs for cities and special districts. She assists with MSRs for various LAFCOs including Shasta, Del Norte, and Humboldt.

Cosette is a recent graduate of Humboldt State University with a major in Environmental Science and Management. She focused on planning and policy with a minor in Geospatial Science. She has worked collaboratively with local governments on a variety of projects including affordable housing regulation, comprehensive economic development strategy, and housing elements. Due to this experience, she is skillful at permit review and processing, research and review of resource documents referring to municipal services, and document preparation that coincide with LAFCo processes.

### EDUCATION

Humboldt State University  
*B.S. – Environmental Science and Management, 2021*

### TRAINING/PROFESSIONAL AFFILIATIONS

Board Member at Friends of the Arcata Marsh 2019 to 2021

Humboldt Bay Nuclear Waste Study for HSU Capstone Course with the Humboldt Bay Harbor District

### Relevant Project Experience

- Humboldt LAFCo Municipal Service Reviews  
Recently, Cosette has helped draft the South Humboldt County Regional MSR/SOI updates. Cosette was responsible for development of the draft MSR which includes a review of water, wastewater, stormwater, fire/emergency response, and solid waste removal services. Cosette analyzed the services provided by the districts and identified financial trends. She assisted with administrative services through preparing mailings and district notices.
- Shasta LAFCo Municipal Service Reviews  
Cosette has been responsible for collecting data and drafting agency profiles for community services districts, fire protection districts, and hospital districts in Shasta County. Services reviewed include water, fire, and healthcare. The Shasta CSD MSR specifically discussed the district's water conservation program, fire services for divestiture, and both a fire and water services budget.
- Del Norte LAFCo Municipal Service Reviews  
Cosette helped draft the south county regional community services district MSR and the county-wide fire protection district MSR in Del Norte County. Services reviewed in both include water, wastewater, and fire. Cosette provided administrative services through the preparation of staff reports, meeting minutes, and a notice of exemption application.
- Humboldt County Fee Waiver Ordinance  
Cosette worked to gather resources from other jurisdictions relating to fee waiver ordinances, as well as relevant California statutes and regulations. She also researched related case law to help the county avoid potential litigation. Sample ordinances were referenced in order to create a final ordinance for the county.