

## Section 4 – Scope of Work

### General Approach to Assignment

Our general approach to completion of the MSR/SOI Study follows a process that we have used in many of the documents we have successfully prepared for other LAFCOs. The basic steps are summarized below.

**Task 1 – Initiate Project:** This important first step establishes the foundation upon which the subsequent tasks are built, and includes a review of the scope of work, schedule, and deliverables.

**Task 2 – Contact Cities and Collect Data:** The City of Placerville and City of South Lake Tahoe will be the sources of considerable data that we will use to prepare the MSR/SOI Study. Our data collection process includes the use of a questionnaire, as well as initial and follow-up personal communications.

**Task 3 – Conduct Data Analysis:** We will organize and analyze the data that we have collected in order to address each of the topic areas, or determinations, prescribed in the Cortese-Knox-Hertzberg (CKH) Act for MSRs and SOI studies.

**Task 4 – Solicit Feedback on Data Collect and Analyze Data:** We will submit our preliminary analyses to the cities in order for each of them to corroborate the accuracy of our preliminary analyses. This accuracy check will focus on MSR issue areas 1, 2, and 3:

1. Growth and population projections for the area,
2. Location and characteristics of any disadvantaged unincorporated communities within or contiguous to the SOI, and
3. Capacity of public facilities, adequacy of public service and infrastructure needs or deficiencies.

**Tasks 5 through 9 – Prepare Administrative Draft, Draft, and Final MSR/SOI Study, Meet with LAFCo staff, and LAFCo Commission:** These steps provide for LAFCo staff to review the thoroughness of the document before it is presented to the Commission for consideration. We will support LAFCo staff in the public hearing process.

**Task 10 – Project Management, Coordination, and Quality Assurance:** This task will be applied throughout the scope of work, and involves ongoing communication with LAFCo staff, proactive attention to and resolution of issues, and skillful project management in order to meet LAFCo's needs.

### Detailed Scope of Work

The following tasks describe our proposed scope of work for completion of the MSR/SOI Study from project initiation through Commission approval. A proposed schedule is also provided.

#### Task 1 Initiate Project

Upon contract execution and notice to proceed, Quad Knopf's project manager will meet with El Dorado LAFCo staff in person to initiate the scope of work described herein. Topics to be covered at the meeting will include the following:

1. Establish communication protocols and communication expectations between the Quad Knopf team and LAFCo staff;
2. Collect available relevant data from El Dorado LAFCo;

3. Identify documents and data expected to be available from the City of Placerville and City of South Lake Tahoe;
4. Review scope of work and schedule and make revisions as directed by LAFCo staff; and
5. Prepare questionnaire that will be sent to the City of Placerville and City of South Lake Tahoe to obtain information

**Deliverables:**

- ◆ Data collection questionnaire

**Task 2 Contact Cities and Collect Data**

Establishing a good relationship with the staff of both cities will be of critical importance. The first step in this task is to contact, either in person or by phone, managers at the cities in order to establish working relationships and effective lines of communication. In this initial communication we will also summarize the scope of our work.

As noted in Task 1, Quad Knopf will prepare a questionnaire that, after being reviewed and approved by LAFCo staff, will be sent to the City in order to obtain the information needed to complete certain parts of the analysis in accordance with the issue areas listed in Task 3. The questionnaire will not be the sole means of communication with staff; rather, it should be viewed as a convenient checklist that will facilitate the task of identifying and collecting the requested information.

As a follow-up to information provided in the questionnaire, we will conduct personal interviews either in person or by telephone in order to fill any information gaps and/or obtain answers to any unanswered questions.

**Task 3 Conduct Data Analysis**

The Quad Knopf team will analyze the data collected in Task 2 as pertains to the issue areas identified in the CKH Act. The CKH Act requires analysis of, and determinations for, seven issue areas, as listed below.

1. Growth and population projections for the area;
2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the SOI;
3. Capacity of public facilities, adequacy of public service and infrastructure needs or deficiencies;
4. Financial ability of agencies to provide services;
5. Status of, and opportunities for, shared services;
6. Accountability for community service needs, including governmental structure and operation efficiencies; and
7. Any other matter related to effective or efficient service delivery.

In addition, the CKH Act specifies that SOI studies include analyses and determinations for the following five issue areas:

1. The present and planned land uses in the area, including agricultural and open space lands;
2. The present and probable need for public facilities and services in the area;
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide;
4. The existence of any social or economic communities of interest in the area if they are relevant to the agency; and
5. The present and probable need for public facilities and services of any disadvantaged unincorporated communities within the existing SOI.

**Task 4 Solicit Feedback on Data Collected and Analyze Data**

The purpose of this task is to confirm that the cities consider the data we collected to be factual and acceptable before the Quad Knopf team presents its analysis and makes preliminary determinations in accordance with the CKH issue areas. Once the collected data have been organized in accordance with the issue areas described above, the Quad Knopf team will provide the city staff with excerpts of the working draft MSR/SOI Study in order to get confirmation that the data and our interpretation of these data are factually correct. Based on our previous experience in preparing MSRs, the issue areas that will warrant corroboration by the City of Placerville and City of South Lake Tahoe are MSR issue areas 1, 2, and 3, as listed above.

This strategy has been very successful for us in the past. The additional step of requesting feedback and buy-in from the cities about the facts at hand has been shown to facilitate completion of a factual and useful MSR/SOI study. Once every party is in agreement with the facts, it is easier to focus on MSR and SOI determinations while avoiding arguments over facts.

**Deliverables:**

- ◆ Memorandum - Preliminary Analysis of MSR Issue Areas 1, 2, and 3

**Task 5 Prepare Administrative Draft MSR/SOI Studies**

The Quad Knopf team will prepare an Administrative Draft of the MSR/SOI studies in accordance with El Dorado LAFCo's preferred format. The reports will address the issue areas listed in Task 3 and will be supported by tables, graphics, and GIS-based maps, as appropriate.

**Deliverables:**

- ◆ Administrative Draft MSR/SOI Studies (3 hard copies and one electronic file copy)

**Task 6 Meet With LAFCo staff**

Upon completion of the Administrative Drafts, we will schedule a meeting with El Dorado LAFCo staff in order to review the information contained in the reports. These versions of the reports will contain preliminary determinations. We will look to LAFCo staff to confirm and validate these preliminary determinations before they are incorporated into the public Draft MSR/SOI.

**Task 7 Prepare Draft MSR/SOI Studies**

The Quad Knopf team will prepare the Draft MSR/SOIs based on feedback and direction on the Administrative Draft received from LAFCo staff in Task 6. We will prepare copies of the Draft MSR/SOIs as described below.

**Deliverables:**

- ◆ Draft MSR/SOI Study (15 hard copies and one electronic file copy)

**Task 8 Attend and Participate In LAFCo Commission Hearing**

The Quad Knopf Project Manager will attend and participate in one Commission hearing at which the Draft MSR/SOIs are considered. We assume that both MSR/SOIs will be considered at a single Commission meeting. Our level of participation will be in accordance with LAFCo staff request, and can include making a presentation of the key conclusions and determinations contained in the report.

### **Task 9 Prepare Final MSR/SOI Study**

Quad Knopf will prepare the Final MSR/SOIs following the Commission hearing. The Final reports will address and respond to any direction provided by LAFCo staff as a result of the Commission hearing described in Task 8.

#### **Deliverables:**

- ◆ Final MSR/SOI Study (15 hard copies and one electronic file copy)

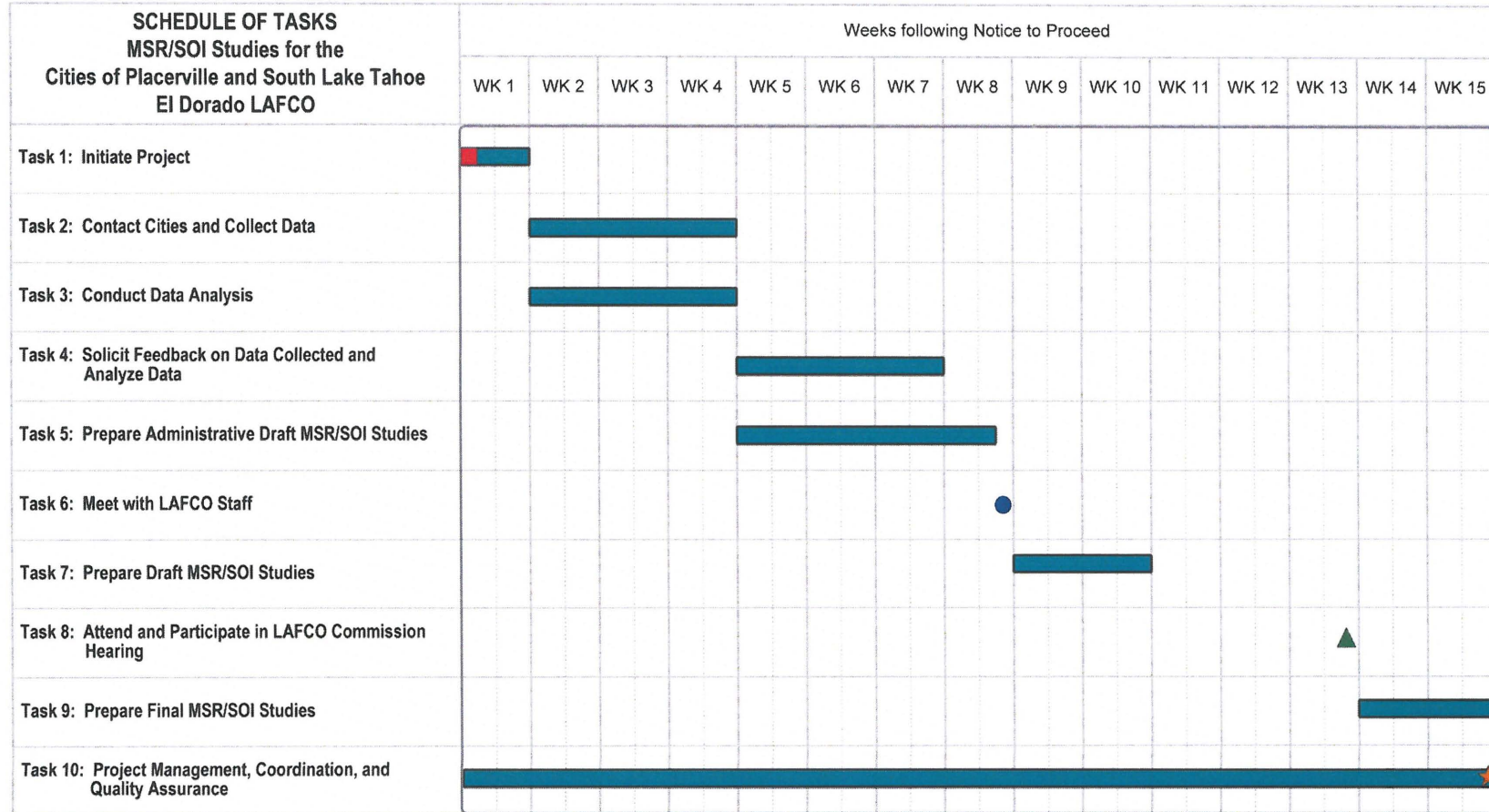
### **Task 10 Project Management, Coordination, and Quality Assurance**

This task covers ongoing project management, quality assurance/quality control, and communications between the Quad Knopf management team and LAFCo staff. We strongly believe in being proactive in identifying and solving issues. Accordingly, if we encounter any obstacles to completing the tasks described in this proposal, we will immediately contact LAFCo staff to discuss possible remedies. We will maintain ongoing telephone and e-mail contact with LAFCo staff in accordance with communication protocols that will be identified during Task 1. While formal meetings are specifically identified in the task descriptions above, we would, for example, be happy to provide status reports via telephone or e-mail on a weekly or bi-weekly basis, if requested.

### **LAFCo Staff Assistance**

Quad Knopf assumes that LAFCo staff would discuss and refine the scope of work during the project initiation meeting, provide advice, review, and feedback on interim deliverables, and collaborate on the presentations to be made at the LAFCo hearings.

## Section 5 – Schedule



**LEGEND:**

- = Project Kick-Off
- = Meeting with LAFCO Staff
- = LAFCO Commission Hearing
- = Project Completion

**Note 1:** The integrity of the timeline is maintained only if each event is accomplished without additional delays which could be caused by events such as the discovery of an issue or concern that warrants additional work, timely responses from the Cities, changes to the project made by LAFCO, significant public controversy, etc.

**Note 2:** This schedule is preliminary only and subject to revisions based on discussions with the LAFCO regarding the scope of work, and desired deadlines.