



EL DORADO LAFCO

Proposal
for a Municipal Service Review and
Sphere of Influence Study for the
El Dorado Hills Community Services District





May 10, 2019

Mr. Jose Henriquez
Executive Officer
El Dorado Local Agency Formation Commission
550 Main Street, Suite E
Placerville, CA 95667

Subject: Proposal to Prepare Municipal Service Review and Sphere of Influence Update for the El Dorado Hills Community Services District

Dear Mr. Henriquez:

Thank you for the opportunity to assist you with the preparation of a Municipal Service Review and Sphere of Influence Update for the El Dorado Hills Community Service District. QK is eager to continue helping El Dorado LAFCO achieve its legislative mandate to promote orderly development and efficient extension of municipal services to the residents of El Dorado County.

QK offers extensive experience in working with many public agencies including our experience with various LAFCOs statewide, and specifically our experience in El Dorado LAFCO, having completed both the Placerville and South Lake Tahoe Municipal Service Reviews. We have a deep understanding of the Cortese-Knox-Hertzberg District Reorganization Act of 2000, the State of California Governor’s Office of Planning and Research’s Municipal Service Review Guidelines, and El Dorado LAFCO’s policies and procedures, all of which outline the requirements for preparation of an MSR/SOI study. Our enclosed proposal describes QK’s expertise preparing MSRs and SOI studies, including oversight, review, and presentation of MSRs to LAFCO.

Our highly qualified El Dorado LAFCO team includes not only knowledgeable policy planners, but also staff that have been public servants for LAFCOs, cities, and counties, and who have significant knowledge and experience in municipal services and financial issues. Our project team is familiar with rules and policies of El Dorado LAFCO through preparation of prior MSRs, as well as experience gained as former LAFCO staff.

Jerome Keene, AICP will serve as our Project Manager and Senior Planner. He will be responsible for day-to-day management of the project. Steve Brandt, AICP, Principal Planner, will oversee the project and administer Quality Assurance and Quality Control. Kira Noguera, Senior Planner, will assist Mr. Keene in the technical preparation of the required studies. Amber Adams, Vice President of Business and Operations, is our Management Contact, and is authorized to contractually obligate the firm.

Please contact Jerome Keene by phone (559.449.2400) or email (Jerome.Keene@qkinc.com) if you have any questions or require additional information. We look forward to hearing from you soon.

Sincerely,

Jerome Keene, AICP
Senior Planner/
Project Manager

Steve Brandt, AICP
Principal Planner/
Principal-in-Charge

Amber Adams
Vice President of
Business & Operations

Enclosure
P190241

Proposal

EL DORADO LOCAL AGENCY FORMATION COMMISSION (LAFCO)

Municipal Service Review and
Sphere of Influence Study for the
El Dorado Hills Community Services District

El Dorado LAFCO
550 Main Street, Suite E
Placerville, CA 95667



601 Pollasky Avenue, Suite 301
Clovis, California 93612
(559) 449-2400

May 10, 2019
P190241

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Firm Overview

QK

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Clovis, CA 93712
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www.QKinc.com

QK has a diverse staff of more than 115 employees in five California offices – Merced, Clovis, Visalia, Porterville, and Bakersfield.

QK is built on five distinct areas of expertise that work together to make the built environment possible. We have the industry's most creative professionals in:

- **Planning**
- Engineering & Construction Mgmt.
- Survey & GIS
- Urban Design & Landscape Architecture
- Biology & Environmental Permitting

Within these five areas of expertise, QK's specialized experience helps visionary clients throughout California. Our services include:

- **Land Use Planning**
- **Civil Engineering**
- Traffic Engineering
- Utility Coordination
- Construction Management
- Labor Compliance
- Land Surveying
- Geographic Information Systems
- Urban Design



- Landscape Architecture
- Environmental Planning
- Biological Resources
- Environmental Permitting

Since 1972, QK has successfully partnered with cities, counties, state agencies, and other public agencies, to use our talents and services in the development of efficient solutions that have lasting positive impacts. These efforts result in the establishment of sustainable communities that offer a better quality of life.

Additionally, QK is:

- **A CALAFCO Associate Member**
- A San Joaquin Valley Blueprint Award Winner
- A Tulare County Association of Governments Local Motion Award Winner
- An APWA, APA, ACEC, ASCE and CPRS Project Award Winner
- A three-time honoree Zweig White Hot Firms List
- A five-time honoree in California Engineering News Record Top Design Firms



Technical Capabilities



PLANNING

Planning/Land Use

QK’s expertise in land use and policy planning **helps clients** with complex projects and then proposes common sense solutions. Our planning staff is accustomed to policy planning consulting services for both the public and private sectors. Many of our staff have experience in public sector planning, working for cities and counties.

QK understands the significant task of guiding a project, plan, or study from concept to reality. Our policy plans promote efficient and sustainable land development, incorporate development and redevelopment patterns that optimize existing infrastructure investments, and consume less land that can then remain available for agriculture, open space, and natural systems.

Our planning staff has a successful track record of leaders’ and residents’ support for their community’s plans. QK’s planners benefit our clients by understanding the interests of stakeholders and residents. Our experience includes:

- **LAFCO Municipal Service Review (MSR) and Sphere of Influence (SOI) Reports**
- **LAFCO Changes of Organization (Annexations, etc.)**
- General Plan Updates
- Zoning Codes - Both Traditional and Form Based Codes
- Land Use Master Planning
- Site Planning
- Specific Plans
- Community Plans
- Corridor Plans

- Design Guidelines and Development Standards
- Williamson Act Administration
- On-site and On-call Planning Department Support/ Extension of City Staff

Public Outreach/Stakeholder Participation

QK generates public awareness, understanding of, and general consensus of key planning concerns. No one is better at aligning stakeholders behind a common set of interests. We help our clients get everyone on the same page. Our outreach experience includes:

- Task Force and Advisory Committee Meeting Facilitation
- Stakeholder Interviews
- Public Participation Plans
- Walking Tours/Bus Tours
- Surveys/Questionnaires
- Turning Point Real Time Surveys
- Design Charettes
- Public Open Houses
- Visioning Workshops
- Public Hearings

Management Level of Understanding of Municipal Services

Since 1972, QK has worked with cities, counties, water districts, school districts, hospital districts, community service districts, mosquito abatement districts, irrigation districts, and LAFCOs. QK's Principals, Project Managers and planning team have extensive experience in the study and planning of municipal services, including water and wastewater services.

Our team has experience working for local public agencies, having represented City or District staff positions in public meetings and hearings on a variety of planning, engineering, and public works topics. Our approach is to provide a solid, objective analysis of issues with measurable comparisons so as to give decision-makers objective reasons to support their decision.

Presenting and Analyzing Information

QK has more than 45 years' experience collecting and compiling municipal service agency documentation for review. Data collected from available sources, such as, but not limited to, capital improvement budgets, maintenance records, master plans and adopted budgets, will be analyzed utilizing Excel spreadsheets, AutoCAD and ERSI GIS mapping analysis software. These tools will allow visualization of the data to properly assess all agency water and wastewater systems and their relation and/or proximity with adjacent systems.

We pride ourselves on the detailed analyses of municipal services and preparing robust and defensible MSR documents that are readable, technically sound, and meet the requirements of the Cortese-Knox-Hertzberg Reorganization Act of 2000. Our key staff have experience working in for cities, counties, and LAFCOs, and have prepared and presented analytical reports to Councils, Planning Commissions, and LAFCOs.

Working with Divergent Interests

Our team has worked on a number of MSRs where multiple agencies were being reviewed at the same time and where they sometimes had differing interests. Our strategy to effectively negotiate these situations is to focus on factual information initially and obtain agreement from participating parties on the data and other nuanced information prior to moving to analysis of the facts. In addition, we understand that public agencies often hold additional data not initially requested that may affect our final analysis. It is our mission to confirm with each agency that we have all of the information required to ensure that each agency is represented fairly in the final report. Our proposed scope of work reflects that strategy.



CORTESE KNOX HERTZBERG

Familiarity with Cortese-Knox-Hertzberg Reorganization Act of 2000 and LAFCO Processes

Municipal Service Reviews

State Law requires that one of the functions of LAFCO is to conduct sphere of influence updates (SOIs) for all agencies under its jurisdiction by January 1, 2008, and every five years after that. State Law also requires the completion of municipal service reviews (MSRs) before determining an agency's SOI. Consequently, all MSRs are precursors to SOI updates. This is logical because SOIs determine how fast and how much an agency may grow within a determinate time period. For the Commission to make that determination, it must first analyze how well that agency is currently providing services so that it can extrapolate where the agency will be in the future. The MSR is intended to be the tool to assist the Commission in that analysis. An MSR looks at how effectively the agency is currently providing services, and whether it is adequately planning for the future provision of services. More comprehensive than a management plan or an audit, the MSR is designed to examine all facets of the agency, from infrastructure needs and deficiencies to management practices and financing.

Spheres of Influence

The Commission utilizes the MSR data to evaluate proposals that may affect a City and how fast or how much that an agency may expand in the next 10 to 20 years. In other words, an SOI is a planning boundary outside an agency's service area. It designates the agency's probable future boundary and service area. Factors considered in an SOI update include current and future land use, the current and future need for service and any related "community of interest."

SOI time horizons vary: sometimes an SOI is set for 10 years, others are set for 20 years and others may not have a predetermined timeframe. Generally speaking, fast growing agencies or agencies with a significant service capacity, may have SOIs with multiple time horizons, whereas agencies with a limited capacity to grow may only receive one SOI line. From a practical standpoint, there is no difference between a 10-year SOI and 20-year SOI, since both are the best estimate of the probable service area for an agency over time, depending upon the Commission's determination of an agency's service capacity as detailed in the MSR.

Ability to Perform Work, Stay within Budget, and Meet Deadlines

QK's ability to successfully complete assignments and meet our clients' expectations is due to several important operating principles, which include assigning the right staff to the project, assigning an experienced and qualified project manager, and applying an internal quality assurance process. Following are the important processes and procedures that we use in the execution of each of our contracts:

- **Strong and Effective Project Management** – QK has experienced and dedicated project managers. The project manager reviews hours spent on the project at least once a week. Every project is discussed once a month by the project manager with QK's President and Chief Financial Officer.
- **Staying on Budget** – QK's project manager is responsible for reviewing project billings and ensuring compliance with the overall budget. QK's computerized project management system, Deltek Vision, is integrated with our accounting and invoicing system. This means that we can assign tasks and required time to complete them, and then track actual hours spent via individual's timesheets.
- **Established Quality Control Program** – Our company-wide Quality Control Program is a particular source of pride. It requires all deliverables (plans, documents, etc.) to be reviewed by a senior-level staff member before it leaves our hands. The Quality Control Program emphasizes technical accuracy, readability, and understandability. All deliverables, after being reviewed internally, will go to LAFCO staff for an administrative review before being released publicly.
- **Proactive Approach to Problems and Solutions** – We strongly believe in taking a proactive approach to problems and their solutions. If we see or foresee an issue that could negatively impact the scope of our work, we will immediately identify solutions.
- **Collaborative Working Relationship** – Using our many experiences with other LAFCOs as a guide, QK will work collaboratively with El Dorado LAFCO staff in developing the subject matter and recommendations for the MSR/SOI Update. Our collaborative approach to communication and our MSR/SOI Update preparation approach will ensure that there are no surprises when the Draft MSR/SOI Update is completed and circulated for public review.
- **Understanding of Needs** – QK has worked, literally for decades, with cities, counties, water districts, school districts, hospital districts, community service districts, mosquito abatement districts, and irrigation districts, and LAFCOs. QK's project management team has extensive municipal planning experience and experience with LAFCO issues, as described below:

- o **Jerome Keene's** planning experience includes working as a planner for Madera County, serving as Executive Officer/Analyst for Madera LAFCO and former Member of the CALAFCO Legislative Committee.
- o **Steve Brandt** was a Staff Analyst for Tulare County LAFCO and the planning manager for the City of Visalia.
- o **QK** is an Associate Member of California Association of LAFCOs (CALAFCO.)



“ QK’s expertise has been very useful during the MSR development process. They listened to all of our concerns and desires and acted as a liaison between LAFCO and the City. Project deliverables submitted to LAFCO for review/comment were received on time. ”

— Ben Giuliani, Executive Officer, Tulare County LAFCO

Team

The QK Project Team includes former LAFCO staff as well as a well-rounded group of experienced planners who have provided a diverse amount of planning contract work for various agencies, such as LAFCOs as well as cities. Further information regarding team members' experience and expertise are included within their resumes as an Appendix to this proposal.

Steve Brandt, AICP Principal-in-Charge, QA/QC Review

- Certified Planner,
American Institute of Certified Planners (AICP)
- BA, Marketing/Management,
Fresno Pacific University



As Principal-in-Charge, Mr. Brandt will provide project oversight to ensure services provided to El Dorado LAFCO meet expectations. Additionally, he will review all work product before they are presented to El Dorado LAFCO to ensure that they meet

QK's high quality standards for all deliverables.

Mr. Brandt is an experienced planning professional and former LAFCO Staff Analyst who takes a strong analytical approach to projects to keep them moving forward. Steve has managed both planning and engineering projects from concept to construction, which gives him the experience to view challenges comprehensively and anticipate the real-world results of his proposed plans, policies, and designs. Prior to joining QK, Steve served in current and advanced planning functions with the City of Visalia, ultimately being appointed Planning Manager.

Mr. Brandt's Similar Work

Project	Client	Location	Role
City of Madera Municipal Service Review (MSR) and Sphere of Influence Update	Madera LAFCO	Madera, CA	Principal Planner
MSR and Sphere of Influence Update	Green Valley Water District	Corcoran, CA	Principal Planner
City Peer Review of MSR Reorganization Associated with Root Creek Water District	Madera LAFCO	Madera County, CA	Principal Planner
Greater Rio Mesa Area MSR	Madera LAFCO	Madera County, CA	Senior Planner
Oakhurst Area MSR	Madera LAFCO	Madera County, CA	Senior Planner
Morgan Ranch Master Plan and EIR	City of Turlock	Turlock, CA	Project Manager/Senior Planner
General Plan / Zoning and Subdivision Ordinance Update	City of Hanford	Hanford, CA	Project Manager/Principal Planner
Contract Planning Services	City of Lemoore	Lemoore, CA	Principal Planner/Contract City Planner



Jerome Keene, AICP
Senior Planner, Project Manager, Primary Point of Contact

Contact Information:
(559) 449-2400
Jerome.Keene@qkinc.com

- Certified Planner, American Institute of Certified Planners (AICP)
- MAS, Community Development, University of Nebraska, Lincoln
- BA, Geography, California State University, Fresno



Mr. Keene will serve as the primary point of contact between El Dorado LAFCO and the QK team. He will be responsible for maintaining the project’s schedule and budget. In addition, Mr. Keene will oversee the preparation of all work product for El

Dorado LAFCO and will represent QK at all meetings.

Mr. Keene has reviewed several large development projects, while also overseeing CEQA and General Plan compliance for various public agencies. His experience includes the review of Master Plans and General Plans to ensure that individual project plans remain consistent with the intent of overarching Plans. Mr. Keene is also a former LAFCO Executive Officer for Madera LAFCO.

Mr. Keene's Similar Work

Project	Client	Location	Role
San Juan Capistrano MSR	Orange County LAFCO	Orange County, CA	Senior Planner
City of Madera MSR and Sphere of Influence Update	Madera LAFCO	Madera, CA	Senior Planner
MSR and Sphere of Influence Update	Green Valley Water District	Corcoran, CA	Senior Planner
City Peer Review of MSR Reorganization Associated with Root Creek Water District	Madera LAFCO	Madera County, CA	Senior Planner
Madera Ranchos MSR and Sphere of Influence Update	Madera LAFCO	Madera County, CA	Senior Planner
City of South Lake Tahoe, MSR and Sphere of Influence Update	El Dorado LAFCO	South Lake Tahoe, CA	Senior Planner
City of Placerville, MSR and Sphere of Influence Update	El Dorado LAFCO	Placerville, CA	Senior Planner
Greenfield County Water District, MSR and Sphere of Influence Update	Kern LAFCO	Kern County, CA	Senior Planner.
Enos Lane Public Utility District, MSR and Sphere of Influence Update	Kern LAFCO	Kern County, CA	Senior Planner
Greater Coarsegold Area, MSR and Sphere of Influence Update	Madera LAFCO	Madera County, CA	Senior Planner
Community Development Support, Community Development Department	City of Delano	Delano, CA	Senior Planner/ Interim Community Development Director
Contract Planning Services	City of Sanger	Sanger, CA	Senior Planner/ Contract City Planner
Contract Planning Services	City of Dinuba	Dinuba, CA	Senior Planner/ Contract City Planner

Kira Noguera
Senior Planner, Research & Analysis and Report Writing

- BS, Environmental Policy Analysis and Planning, University of California, Davis



Ms. Noguera has 13 years public and private planning experience and will assist Mr. Keene with research, analysis and report writing.

of the CEQA process. She has worked on a number of EIRs and MNDs, as well as assisted in the updates to General Plans and Zoning Ordinances for the City of Dinuba, City of Merced, and City of Rocklin. Ms. Noguera has previously worked as a planner at the Cities of Madera and Fresno, and while at QK, provided onsite contract planning services for the City of Rocklin and the County of Calaveras.

Ms. Noguera is a graduate in the field of environmental policy and planning with a strong understanding

Ms. Noguera's Similar Work

Project	Client	Location	Role
Contract Planning Services	City of Lemoore, CA	Lemoore, CA	Contract Planner
Contract Planning Services	City of Rocklin, CA	Rocklin, CA	Contract Planner
Contract Planning Services	County of Calaveras, CA	County of Calaveras, CA	Contract Planner
Chowchilla Subdivision & Zoning Ordinance Update	City of Chowchilla, CA	Chowchilla, CA	Senior Planner
Zoning Ordinance Update	City of Dinuba, CA	Dinuba, CA	Project Planner
Morgan Ranch Master Plan and EIR	City of Turlock, CA	Turlock, CA	Project Planner

Availability

Our proposed project team has the following availability to commit to the El Dorado LAFCO:

Team Member	Title	Role	Percent Availability
Steve Brandt, AICP	Principal Planner	Principal-in-Charge and Quality Assurance/Quality Control	15%
Jerome Keene, AICP	Senior Planner	Project Manager and Primary Point of Contact	20%
Kira Noguera	Senior Planner	Research & Analysis, Report Writing	20%



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Experience

Madera County LAFCO

Contact:

Dave Braun, Executive Officer
200 West 4th Street
Madera, CA 93637
Ph: (559) 675-7821

Alameda County LAFCO

Contact:

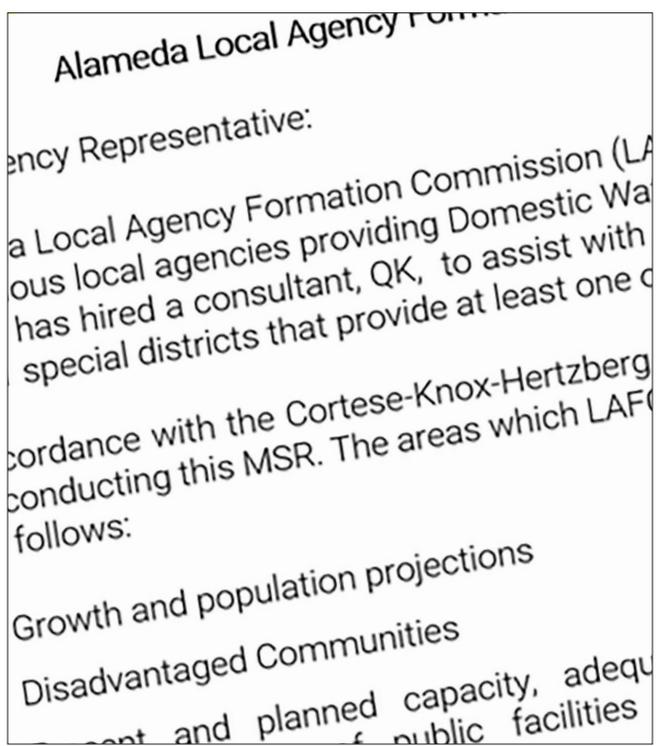
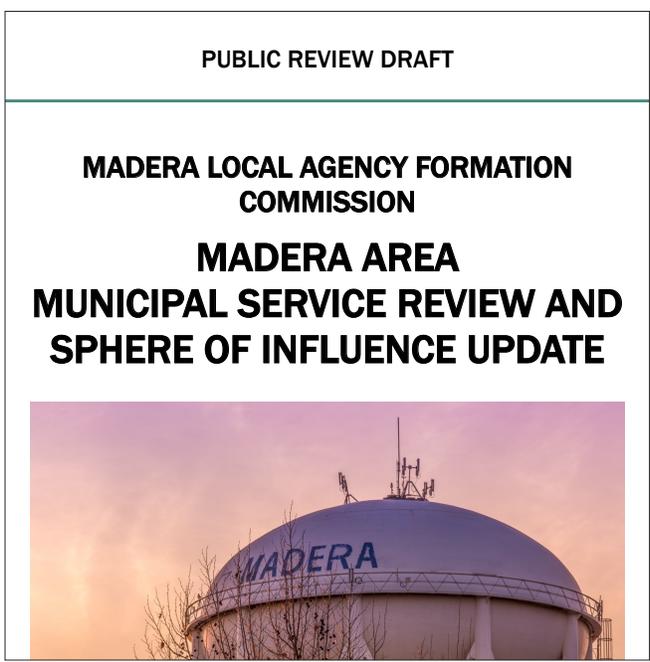
Rachel Jones, Executive Officer
1221 Oak Street, Rm. 555
Oakland, CA 94612
Ph: (510) 271-5142

City of Madera Municipal Service Review and Sphere of Influence Update

QK prepared an MSR and SOI for the City of Madera and the surrounding special districts. The regional approach to the MSR and SOI Review allowed for a comprehensive analysis of how the agencies provide the range of municipal services to its residents while reviewing its potential growth in accordance with state and local mandated requirements, discussed below. QK acted as an extension of LAFCO staff and the Executive Officer and is provided the third-party point of view that LAFCO's are mandated to offer as it relates to urban growth, municipal service delivery, and agricultural land/open space preservation issues. The MSR was adopted in October 2018.

Countywide Municipal Services Review and Related Sphere of Influence Updates (in process)

QK was recently selected to provide Countywide Municipal Services Review and Related Sphere of Influence Updates for Alameda County LAFCO. The MSR will cover the topics of water, wastewater, flood control, and storm drainage. QK will act as an extension of LAFCO staff and the Executive Officer and will provide the third-party point of view that LAFCOs are mandated to offer as it relates to urban growth, and municipal service delivery.





Orange LAFCO

Contact:

Carolyn Emery, Executive Officer
2677 N. Main Street, Suite 1050
Santa Ana, CA 92705
Ph: (714) 640-5100

San Juan Capistrano Municipal Services Review

As a subconsultant, QK assisted with the development of a Municipal Services Review for Orange County LAFCO which covered the City of San Juan Capistrano’s water, wastewater, and recycled water systems. The project included technical analysis and recommendation of the best nearby special district to acquire and operate these City services to improve the efficiency of service provision. The choice was made from three neighboring special districts. The MSR was adopted in September 2018.

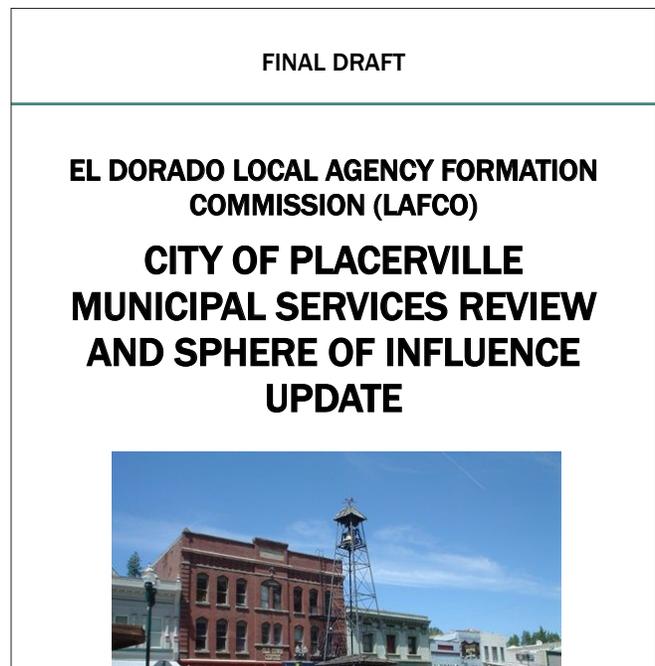
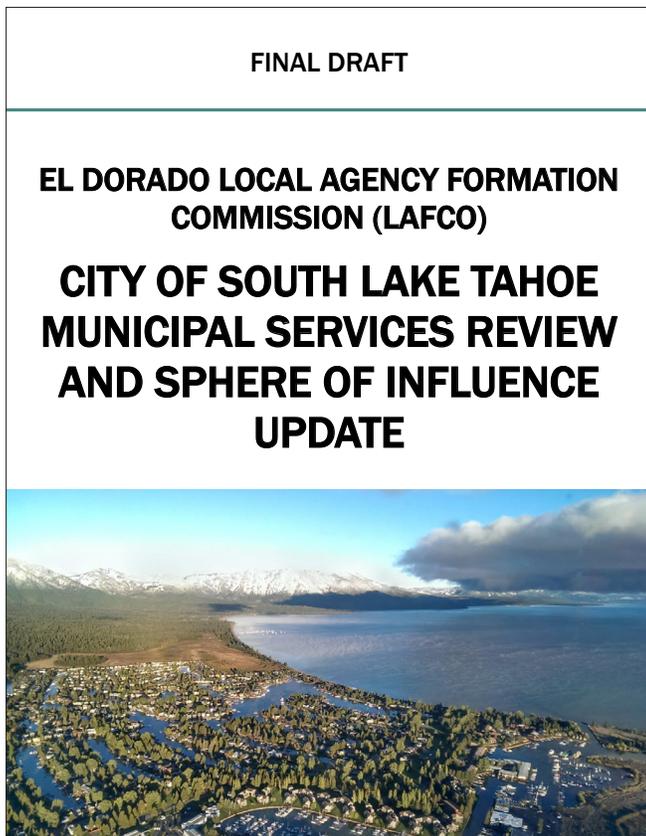
El Dorado LAFCO

Contact:

Jose Henriquez, Executive Officer
550 Main St E
Placerville, CA 95667
Ph: (530) 295-2707

Cities of Placerville and South Lake Tahoe Municipal Service Reviews and SOI Updates

QK was contracted by the El Dorado LAFCO to prepare the MSRs and SOI updates for both the Placerville and the City of South Lake Tahoe. The City of Placerville is the county seat of El Dorado County located in central El Dorado County along Highway 50 and has a population of approximately 10,000 residents. The City of South Lake Tahoe is in eastern El Dorado County, abutting the California/Nevada state line, and has a population of approximately 21,000 residents. These projects were done as individual reports with separate data collection and analysis to determine the appropriate findings and ultimately Sphere of Influence determinations. The MSRs were adopted by the El Dorado LAFCO Commission August 2017 and September 2016, respectively.



Approach/Scope

Project Understanding

El Dorado LAFCO (LAFCO) is tasked with updating MSRs and reviewing the Spheres of Influence (SOI) of local agencies within its jurisdiction. LAFCO is seeking the assistance of a consulting firm for the preparation of an MSR and SOI review for the El Dorado Hills Community Services District in accordance with the Cortese-Knox-Hertzberg Reorganization Act of 2000 (CKH), LAFCO Service Review Guidelines, and the El Dorado LAFCO's Policies and Guidelines. This regional approach to the MSR and SOI Review would allow for a comprehensive analysis of how these agencies provide the range of municipal services to its residents while reviewing its potential growth based on development proposals identified within the unincorporated county in accordance with state and local mandated requirements, discussed below. Lastly, QK would be acting solely as an extension of LAFCO staff and the Executive Officer and therefore would provide the third-party point of view that LAFCOs are mandated to offer as it relates to urban growth, municipal service delivery, and agricultural land/ open space preservation issues.

Local service providers' operations are generally financed through property tax collection, special assessments or fees for services. The delivery of those municipal funded services by each agency is a prime issue that LAFCOs are tasked with evaluating. CKH envisions the MSR/SOI review process to aid in achieving LAFCO's mandate and responsibility to promote "logical and orderly development and coordination of local governmental agencies subject to the jurisdiction of the commission to advantageously provide for the present and future needs of the county and its communities."

MSRs that are prepared for LAFCO must contain an analysis of the identified service providers and a written statement of determinations with respect to each of the following areas of review:

1. Growth and population projections for the affected area.
2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.
3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.
4. Financial ability of agencies to provide services.
5. Status of, and opportunities for, shared facilities.
6. Accountability for community service needs, including governmental structure and operational efficiencies.
7. The potential effect of agency services on agricultural and open space lands. (El Dorado LAFCO Policy)
8. Any other matter related to effective or efficient service delivery, as required by commission policy.



Following completion of the MSR, the information and analysis that has been generated will be used to conduct a review of the existing SOIs of each agency. The SOI Update report must then evaluate the suitability of the existing SOI of each service provider and include a written statement of determinations with respect to each of the following issues:

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 the commission determines that they are relevant to the agency.
5. For an update of a sphere of influence of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, that occurs pursuant to subdivision (g) on or after July 1, 2012, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

When conducting a comprehensive review of any service providing agency, information gathering, and data collection is crucial to adequately understand the operating state of a local service provider. It is also important to have knowledge of the prior reports or analysis conducted for each agency. Regarding the El Dorado Hills Community Services District, there was an MSR prepared for the District in 2012. Therefore, there is a relatively recent comprehensive review which can be relied upon as a basis for conducting the current review. The additional primary information that will be relied upon from the District will include recently adopted fiscal year budgets, any infrastructure master plan documents, and any other pertinent supplement reports related to the delivery of municipal services to community residents that has been updated since the 2012 MSR.

The goal of this MSR and SOI Review would be to provide a summary of any past findings but to conduct a new, independent review as it relates to the current state of their operations and service delivery to residents within El Dorado Hills Community Services District and the sphere of influence, in accordance with CKH and El Dorado LAFCO policies.

Anticipated Issues

As identified in the RFP and upon further discussions with El Dorado LAFCO staff, there are two development proposals which are being processed by El Dorado County that are among the items to be considered as part of this MSR/SOI review. The proposals will be conducted their own environmental review under the California Environmental Quality Act (CEQA). However, it appears that any SOI amendment or expansion was not considered as part of that review. QK will work with El Dorado LAFCO staff to properly insure that any proposed amendment is compliant with CEQA. However, it is assumed that any SOI amendments will not require additional environmental documentation such as an IS/MND, based on discussions with LAFCO staff.

The MSR/SOI will need to analyze the existing service delivery and existing capacity conditions of the existing Cable TV franchise administration, CC&R administration, street lighting and landscape, parks and recreation, and solid waste collection services provided by El Dorado Hills Community Services District. After speaking with LAFCO staff, it appears that one of the identified proposed developments has not been submitted which makes estimating service needs and demands difficult. Further discussion with the County and/or project proponent may be needed in order to provide viable estimates and conclusions as to any proposed sphere amendment.

General Approach to Project

Our general approach to completion of the MSR/SOI Update 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 Agencies and Collect Data: The El Dorado Hills Community Services District, County of El Dorado, El Dorado LAFCO and other various service providers within the project area will be the sources of considerable data that we will use to prepare the MSR/SOI. 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 CKH Act for MSRs and SOI Update.

Task 4 – Solicit Feedback on Data Collect and Analyze Data: We will submit our preliminary analyses to the agencies 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 affected area.
2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.
3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.

Tasks 5 through 9 – Prepare Administrative Draft, Draft, and Final MSR/SOI Update, Meet with LAFCO staff, and LAFCO Commission: These steps provide for LAFCO staff to first review the thoroughness of the document before it is presented to local agencies, the public and subsequently 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 Update from project initiation through Commission approval. A proposed schedule is also provided.

Task 1 – Initiate Project

Upon contract execution and notice to proceed, QK'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 QK team and LAFCO staff;
2. Collect available relevant data from El Dorado Hills Community Services District, County of El Dorado and LAFCO;
3. Identify documents and data expected to be available from the identified agencies;
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 County of El Dorado as well as other utility service providers to obtain information.

Task 1 Deliverables:

- Data collection questionnaire



Task 2 – Contact Agencies and Collect Data

Establishing a good relationship with the staff of the agencies will be of critical importance. The first step in this task is to contact, either in person or by phone, primary points of contacts 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, QK will prepare a questionnaire that, after being reviewed and approved by LAFCO staff, will be sent to the agency contacts 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 to fill any information gaps and/or obtain answers to any unanswered questions.

Task 3 – Conduct Data Analysis

The QK 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 affected area.
2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.
3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.

4. Financial ability of agencies to provide services.
5. Status of, and opportunities for, shared facilities.
6. Accountability for community service needs, including governmental structure and operational efficiencies.
7. Any other matter related to effective or efficient service delivery, as required by commission policy.

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 the commission determines that they are relevant to the agency.
5. For an update of a sphere of influence of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, that occurs pursuant to subdivision (g) on or after July 1, 2012, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

Task 4 – Solicit Feedback on Data Collected and Analyze Data

The purpose of this task is to confirm that the agencies consider the data we collected to be factual and acceptable before the QK 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 issue areas that will warrant corroboration by the County 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 about the facts at hand has been shown to facilitate completion of a factual and useful MSR/SOI study. Once all parties are in agreement with the facts, it is easier to focus on MSR and SOI determinations while avoiding arguments over facts.

Task 4 Deliverables:

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

Task 5 – Prepare Administrative Draft MSR/SOI Update

The QK team will prepare an Administrative Draft of the MSR/SOI Update 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.

Task 5 Deliverables:

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

Task 6 – Meet with LAFCO staff

Upon completion of the Administrative Draft, we will schedule a meeting or conference call with El Dorado LAFCO staff in order to review the information contained in the reports. This version of the report 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 Update

The QK team will prepare the Draft MSR/SOI Update based on feedback, comments and direction on the Administrative Draft received from LAFCO staff in Task 6. We will prepare copies of the Draft MSR/SOI Update as described below.

Task 7 Deliverables:

- Draft MSR/SOI Update (10 hard copies and one electronic file copy)

Task 8 – Attend and Participate in LAFCO Commission Hearings

QK will attend and participate in one Commission hearing at which the Draft MSR/SOIs are considered. We assume that the MSR and SOI Update 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 Update

QK will prepare the Final MSR/SOI Update 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.

Task 9 Deliverables:

- Final MSR/SOI Update (10 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 QK 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.

Conflicts of Interest

QK is not aware of any potential conflicts of interest with the local agencies in El Dorado County.



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El Dorado LAFCO Staff Assistance

QK 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.



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Schedule

QK 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.

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
Task 1 - Initiate Project LAFCo Contract Approval Meet with Subject Agency Staff	 							
Task 2 - Contact Agencies and Collect Data Review Agencies' website for existing information Send data request for information to agencies Agencies response due to QK		 						
Task 3 - Conduct Data Analysis Organize and analyze collected data per CKH Act		 						
Task 4 - Solicit Feedback Agency follow-up and site visits Analyze collected data, request additional data as needed Prepare memorandum of initial findings			 					
Task 5 - 9 - Prepare Administrative Draft, Draft and Final MSR, Meet with LAFCo staff, and the Commission Prepare Administrative Draft Municipal Services Review/SOI Update Agencies' staff edits to Administrative Draft MSR/SOI Updates due to QK Review and Incorporate agencies' staff edits as appropriate Draft MSR/SOI Updates to LAFCo staff Comment period for Draft MSR/SOI Updates Respond to comments and prepare Final MSR/SOI Update Presentation of Final MSR/SOI Update at Commission Meeting		 						
Task 10 - Project Management, Coordination, and Quality Assurance								

-  Agency Meeting
-  Deliverables
-  Public Meeting or Public Hearing

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 LAFCo or affected agencies, changes to the project made by the County, 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.



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Proposed Cost

The following is QK's proposed cost for the Municipal Service Review and Sphere of Influence Study for the El Dorado Hills Community Services District.

Team Member	Title	Role	Hourly Rate
Steve Brandt, AICP	Principal Planner	Principal-in-Charge and Quality Assurance/ Quality Control	\$157
Jerome Keene, AICP	Senior Planner	Project Manager and Primary Point of Contact	\$142
Kira Noguera	Senior Planner	Research & Analysis, Report Writing	\$142

Task Description	Personnel Hours					Budget				
	Principal Planner	Senior Planner	Senior Planner	Clerical/Project Assistant	Total Hours	TOTAL LABOR	Miscellaneous Expenses	Mileage	TOTAL NON-LABOR EXPENSES	TOTAL WITH EXPENSES AND CONTINGENCY
Labor Rates	\$157	\$142	\$142	\$88			\$0.580			
General										
1 - Initiate Project/Kickoff Meeting	4.0	1.0	1.0	3.0	9.0	\$1,176	-	\$0	\$1,176	
2 - Contact City and Collect Data					5.0	\$710	-	\$0	\$710	
3 - Conduct Data Analysis		8.0	6.0		14.0	\$1,988	-	\$0	\$1,988	
4 - Solicit Feedback on Data Collected and Analyzed Data	2.0	2.0	2.0		6.0	\$882	\$232	\$232	\$1,114	
5 - Prepare Administrative Draft Municipal Services Review/SOI Update	4.0	20.0	40.0	3.0	67.0	\$9,412	-	\$0	\$9,412	
6 - Meet with LAFCo Staff	1.0	6.0			7.0	\$1,009	-	\$0	\$1,009	
7 - Prepare Draft Municipal Services Review/SOI Update	2.0	8.0	12.0	3.0	25.0	\$3,418	\$100	\$100	\$3,518	
8 - Attend and Participate in LAFCo Commission Workshop			6.0		6.0	\$852	\$232	\$232	\$1,084	
9a - Prepare Final Draft Municipal Services Review/SOI Update	2.0	4.0	6.0	2.0	14.0	\$1,910	\$100	\$100	\$2,010	
9b - Attend and Participate in LAFCo Commission Public Hearing			6.0		6.0	\$852	\$232	\$232	\$1,084	
10 - Project Management and Coordination	12.0				12.0	\$1,884	-	\$0	\$1,884	
Subtotals	27.0	61.0	72.0	11.0	171.0	\$24,093	\$200	\$696	\$896	\$24,989
Contingency Budget										\$2,499
TOTALS	27.0	61.0	72.0	11.0	171.0	\$24,093	\$200	\$696	\$896	\$27,488



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Copy of Previous MSR

Below is a link to the Madera Local Agency Formation Commission Madera Area Municipal Service Review and Sphere of Influence Update completed by QK in August 2018:

<https://www.maderacounty.com/home/showdocument?id=12324>



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Statement of Insurance

QK will provide the following insurance coverages and will provide a certificate of coverage to LAFCO prior to commencement of services.

The following is a description of QK's insurance coverage:

1. Worker's compensation insurance with statutory limits and employer's liability insurance with limits of not less than \$1,000,000 per accident.
2. Commercial general liability insurance with a combined single limit of not less than \$2,000,000 per occurrence and aggregate. Such insurance includes products/completed, operations liability, owner's and contractor's protective, blanket contractual liability, personal injury liability and broad form property damage coverage. Such insurance shall name the public agency, its appointed and elected officials, and its officers and employees as insured and shall be primary with respect to any insurance or self-insurance programs maintained by the agency. Such insurance contains standard cross liability provisions.
3. Umbrella liability insurance with limits of \$3,000,000 per occurrence and aggregate.
4. Commercial automobile liability insurance with a combined single limit of not less than \$1,000,000 per occurrence and aggregate. Such insurance includes coverage for owned, hired and non-owned automobiles and is provided by a business automobile policy.
5. Professional liability (errors and omissions) insurance with a limit of not less than \$2,000,000.



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