



Balancing Community and Commerce

44 N. SAN JOAQUIN STREET SUITE 374 STOCKTON, CA 95202 209-953-7646

## MEETING AGENDA

THURSDAY, JANUARY 9, 2025, 9:00 A. M.  
BOARD OF SUPERVISORS CHAMBERS  
44 NORTH SAN JOAQUIN STREET, 6<sup>TH</sup> FLOOR  
STOCKTON, CALIFORNIA

Call to Order  
Announce Date and Time of Meeting for the Record  
Roll Call  
Pledge of Allegiance  
Selection of 2025 Chair and Vice Chair

### **CONSENT ITEMS**

1. SUMMARY OF MINUTES OF DECEMBER 12, 2024  
(Possible Discussion and Possible Action by All Members)  
Approve Summary Minutes of the Regular Meeting.

### **PUBLIC HEARING**

2. AWARD CONTRACT FOR THE FIRE AND EMERGENCY SERVICES IN RURAL SAN JOAQUIN COUNTY ALTERNATIVE GOVERNANCE AND SERVICE REVIEW STUDY TO RSG/PLANWEST IN THE AMOUNT OF \$190,245.00.

### **PUBLIC COMMENTS**

3. Persons wishing to address the Commission on matters not otherwise on the agenda.

Public Comments on matters within the jurisdiction of the San Joaquin Local Agency Formation Commission that are not listed on the Agenda. Please no personal attacks.

Written public comments will not be read during the Public Comment period. Written public comments submitted prior to the meeting will be routed to the Commission. All written public will be made part of the official record on file.

### **EXECUTIVE OFFICER COMMENTS**

4. Comments from the Executive Officer  
A) CALAFCo Matters

### **COMMISSIONER COMMENTS**

5. Comments, Reports, or Questions from the LAFCO Commissioners

**ADJOURNMENT**

\* \* \* \*

**DISCLOSURE OF BUSINESS OR CAMPAIGN CONTRIBUTIONS TO COMMISSIONERS**

Government Code Section 84308 requires that a Commissioner (regular or alternate) disqualify herself or himself and not participate in a proceeding involving an "entitlement for use" application if, within the last twelve months, the Commissioner has received **\$250 or more in business or campaign contributions from an applicant, an agent of an applicant, or any financially interested person who actively supports or opposes a decision on the matter.** A LAFCo decision approving a proposal (e.g., for an annexation) will often be an "entitlement for use" within the meaning of Section 84308. Sphere of Influence determinations are exempt under Government Code Section 84308.

If you are an applicant or an agent of an applicant on such a matter to be heard by the Commission and if you have made business or campaign contributions totaling \$250 or more to any Commissioner in the past twelve months, Section 84308(d) requires that you disclose that fact for the official record of the proceeding. The disclosure of any such contribution (including the amount of the contribution and the name of the recipient Commissioner) must be made either: 1) In writing and delivered to the Secretary of the Commission prior to the hearing on the matter, or 2) By oral declaration made at the time the hearing on the matter is opened. Contribution disclosure forms are available at the meeting for anyone who prefers to disclose contributions in writing.

# Agenda Item 1



Balancing Community and Commerce

44 N. SAN JOAQUIN STREET SUITE 374 STOCKTON, CA 95202 209-468-3198

## **SUMMARY MINUTES** **December 12, 2024**

**BOARD OF SUPERVISORS CHAMBERS**  
**44 NORTH SAN JOAQUIN STREET, 6<sup>TH</sup> FLOOR**  
**STOCKTON, CALIFORNIA**

Chairman Johnson called the meeting to order at 9:00 a.m.

MEMBERS PRESENT: Commissioners Breitenbucher, Patti, Villapudua, and Chairman Johnson

MEMBERS ABSENT: Commissioners Diallo

ALTERNATE MEMBERS PRESENT: Commissioners Ding, Dhatt, and Barton

ALTERNATE MEMBERS ABSENT: None

OTHERS PRESENT: J.D. Hightower, Executive Officer; Legal Counsel Nubia Goldstein; and Claudia Iboa, Administrative Assistant

## **CONSENT ITEMS**

The Chairman introduced Agenda Item No. 1, Summary of Minutes.

Chairman Johnson opened the floor to Commissioner Comments.

No Comments were made.

Chairman Johnson opened the floor to Public Comments.

No Comments were made.

A motion was made by Commissioner Patti and seconded by Commissioner Villapudua to approve the Consent Items.

Chairman Johnson asked for a Roll Call Vote:

Ayes: Commissioners Breitenbucher, Diallo, Dhatt, Villapudua, and Chairman Johnson

Noes: None

Abstain: None

## **PUBLIC HEARING**

2. .REQUEST OF CENTRAL SAN JOAQUIN WATER COSERVATION DISTRICT FOR THE ADDITION OF TWO (2) ACRES OF TERRITORY LOCATED AT 13300 SOUTH JACK TONE ROAD (APN 203-040-05). THE COMMISSION WILL CONSIDER THREE (3) RESOLUTIONS IN SEQUENTIAL ORDER:

- A) Resolution approving detachment of said territory from the South San Joaquin Irrigation District (SSJID) Sphere of Influence (SOI), Irrigation and Drainage Area "B", and
- B) Resolution approving a Service Review (MSR) and SOI Update for the Central San Joaquin Water Conservation District (CSJWCD); and
- C) Resolution approving the annexation of territory at 13300 South Jack Tone Road to CSJWCD.

J.D. Hightower, Executive Officer, presented a PowerPoint presentation on the San Joaquin Water Conservation District. The proposes project would provide two (2) acres of territory located at 13300 South Jack Tone Road.

Chairman Johnson opened the floor to Commissioners Comments

No Comments were made.

Chairman closed Public Comments

Chaiman Johnson closed Public Comments.

No Comments were made.

A motion was made by Commissioner Patti and seconded by Commissioner Breitenbucher to approve Resolution 24-1547, 24-1545, 24-1546 approving detachment of said territory from the South San Joaquin Irrigation District (SSJID) Sphere of Influence (SOI), Irrigation and Drainage Area "B", and approving a Service Review (MSR) and SOI Update for the Central San Joaquin Water Conservation District (CSJWCD); and Resolution approving annexation of territory at 13300 South Jack Tone Road to CSJWCD.

Chairman Johnson asked for a Roll Call Vote:

Ayes: Commissioners Breitenbucher, Patti, Villapudua, and Chairman Johnson

Noes: None

### **PUBLIC COMMENTS**

4. Persons wishing to address the Commission on matters not otherwise on the agenda.

### **EXECUTIVE OFFICER COMMENTS**

5. Mr. J.D. Hightower, Executive Officer, informed the Commission on the upcoming CALAFCO Association dues for next coming meeting. Staff also received proposals from three firms regarding the Rural Fire Protection District, which will be reviewed at next month's meeting. The Commission recognized outgoing Commissioner Patti and Commissioner Villapudua for their eight years of service to San Joaquin LAFCo.

### **COMMISSIONER COMMENTS**

6. Chairman Johnson presented the awards for Commissioner Patti and Commissioner Villapudua for the service to San Joaquin LAFCo.

### **ADJOURNMENT**

Chairman Johnson adjourned the meeting at 9:28 a.m.

# Agenda Item 2



Balancing Community and Commerce

44 N. SAN JOAQUIN STREET SUITE 374 STOCKTON, CA 95202 209-468-3198

## EXECUTIVE OFFICER'S REPORT

DATE: January 9, 2025  
TO: LAFCo Commissioners  
FROM: J.D. Hightower, Executive Officer  
SUBJECT: **AWARD CONTRACT FOR THE FIRE AND EMERGENCY SERVICES IN RURAL SAN JOAQUIN COUNTY ALTERNATIVE GOVERNANCE AND SERVICE REVIEW STUDY**

### RECOMMENDATION:

It is recommended that the Commission award the contract for preparation of the Fire and Emergency Services in Rural San Joaquin County Alternative Governance and Service Review Study to the lowest responsive bidder, RSG/PlanWest in the amount of \$190,245.00.

### BACKGROUND:

SJLAFCo issued a Request for Proposals for the preparation of Alternative Governance and Service Review Study on October 23, 2024 (please see Attachment 1). Responses were accepted until December 10, 2024. The Alternate Governance portion of the study will include: A detailed analysis of infrastructure and services within the unincorporated areas of San Joaquin County focusing on a holistic review of fire protection services; a comparative analysis of the financials of all 19 fire protection agencies; and, an objective financial analysis and recommendations for possible reorganization and changes in organization for fire agencies in San Joaquin County.

The Service Review portion will include a streamlined service review analysis of each service provider with a five-year financial forecast analysis, and a written statement of determinations as required by applicable state and federal laws.

There were three responsive bidders – RSG/PlanWest, DeNovo Planning Group and LZH Consulting, LLC (Please see Attachments 1, 2, and 3). Proposed scope of work budgets ranged from \$190,245 to \$296,045 with RSG/PlanWest submitting the lowest bid.

In comparing responses staff did a comparison of the bids received, please see Attachment 4. All 3 responses were very well thought out and explained, with RSG/PlanWest being the lowest responsive bid.

**Attachments:**

- Attachment 1 LAFCo RFP
- Attachment 2 RSG/PlanWest Response
- Attachment 3 DeNovo Planning Group Response
- Attachment 4 LZH Consulting, LLC Response
- Attachment 5 Bid Comparison



# Attachment 1



Balancing Community and Commerce

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## **REQUEST FOR PROPOSALS FOR FIRE AND EMERGENCY SERVICES IN RURAL SAN JOAQUIN COUNTY ALTERNATIVE GOVERNANCE AND SERVICE REVIEW STUDY (Bid Invitations)**

### **I) Introduction**

The San Joaquin Local Agency Formation Commission (LAFCO) seeks proposals from qualified consulting firms to prepare an alternative governance and service review study evaluating nineteen rural agencies that provide fire protection services in San Joaquin County. This report will not address the San Joaquin Emergency Medical Services (EMS) except to establish the relationship with the fire districts and to evaluate the adequacy of services by the fire districts to both fire and medical emergency calls. This report will not evaluate EMS service in San Joaquin County.

There are nineteen (19) rural independent special districts in the County:

- Boggs Tract Fire Protection District
- Clements Rural Fire Protection District
- Colledgeville Fire Protection District
- Eastside Fire Protection District
- Escalon Fire Protection District
- Farmington Fire Protection District
- French Camp-McKinley Fire Protection District
- Lathrop-Manteca Fire Protection District
- Liberty Fire Protection District
- Lincoln Fire Protection District
- Linden-Peters Fire Protection District
- Mokelumne Rural County Fire Protection District
- Montezuma Fire Protection District
- Ripon Fire Protection District
- Thornton Fire Protection District
- Tracy Rural Fire Protection District
- Tuxedo-Country Club Fire Protection District
- Waterloo-Morada Fire Protection District



- Woodbridge Fire Protection District

The study will concentrate on fire protection and emergency medical services for the unincorporated areas of San Joaquin County. The study will be divided into two parts:

The first part, the Alternative Governance Study, will include:

- A detailed analysis of infrastructure and services within the unincorporated areas of San Joaquin County focusing on a holistic review of fire protection services;
- A comparative analysis of the financials of all 19 fire protection agencies;
- An objective financial analysis and recommendations for possible reorganization and changes in organization for fire agencies in San Joaquin County. More details can be found in the Scope of Services below.

The second part, the Service Review Study will include a streamlined service review analysis of each service provider with a five-year financial forecast analysis, and a written statement of determinations as required by the CKH Act. More details can be found in the Scope of Services below.

## **II) Background**

### **A) The Commission**

The San Joaquin Local Agency Formation Commission (SJLAFCo) is formed under provisions of Government Code Section 56000, et. seq., the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000. The regular meetings of the Commission are on the second Thursday of each month at 9:00 a.m.

SJLAFCo employs 2.45 full-time employees and has eight (8) Commissioners. For more information, please visit our website at [www.sjlafco.org](http://www.sjlafco.org).

### **B) Provision of Rural Fire Services in San Joaquin County**

As indicated above, nineteen special independent agencies under LAFCO jurisdiction provide fire and emergency services to the unincorporated areas of San Joaquin County and to some cities via contract. A summary of the known status of each agency is as follows:

Agency	Serviced by/Provides Service to Another Agency	Average Property Tax Increment	Special Tax	Additional Notes
Boggs Tract FPD	Serviced by City of Stockton	32%	No	No active Board members; District property currently going through disposition process; will be dissolved
Clements Rural FPD	No	7.7%	Yes	Volunteer fire district with one paid full-time firefighter; operates one station
Collegeville FPD	No	2.3%	Yes	Only all volunteer fire district
Eastside FPD	Serviced by City of Stockton	19.7%	Yes	Does not own or operate any fire stations
Escalon FPD	No	1.5%	Yes	
Farmington FPD	No	5.1%	No	Operates one station
French Camp-McKinley FPD	Provides service to City of Mountain House	8.1%	Yes	Operates one station
Lathrop Manteca FPD	No	9.9%	Yes	
Liberty FPD	No	13.1%	No	Operates one station
Lincoln FPD	Serviced by City of Stockton	21.7%	No	Zero sphere of influence; does not own or operate any fire stations
Linden-Peters FPD	No	17.5%	Yes	Operates one station
Mokelumne Rural County FPD	No	6.2%	Yes	Operates one station
Montezuma FPD	No	10.3%	Yes	The entire District is within the City of Stockton's SOI
Ripon FPD	No	5.6%	Yes	North east portion of District is within Manteca SOI.

Agency	Serviced by/Provides Service to Another Agency	Average Property Tax Increment	Special Tax	Additional Notes
Thorton FPD	No	4.8%	Yes	Operates one station
Tracy Rural FPD	No	11.6%	Yes	Member of the South County Fire Authority
Tuxedo-Country Club FPD	Serviced by City of Stockton	21.8%	No	Located in an unincorporated island surrounding the City of Stockton
Waterloo-Morada FPD	No	9.3%	Yes	
Woodbridge FPD	No	14.3%	No	

As indicated above, the City of Stockton provides fire services to four of the agencies via contract. French Camp-McKinley FPD provides services to the City of Mountain House via contract. The City of Tracy and the Tracy Rural Fire Protection District joined efforts for the provision of fire services to both jurisdictions under a joint powers agreement (JPA) and formed the South County Fire Authority. Under the JPA, both entities operate collectively under a board of directors distinct from the member districts with board members representing the participating agencies. All of the agencies also participate in a number of mutual and automatic aid agreements as well as Joint Powers Authorities (JPAs). The study will need to detail the type and scope of agreements between all agencies.

The fire protection districts provide fire suppression, fire prevention, fire inspection, basic life support (BLS) emergency medical services, hazardous material mitigation, and a variety of specialty and technical rescue services. The South County Fire Authority and the City of Stockton are authorized by the San Joaquin County EMS Agency to provide non-transport advanced life support (ALS) services. Ripon FPD provides its own ALS and ambulance service, and Escalon and Manteca provide ALS and ambulance service through nonprofit agencies. All other county rural fire districts provide first responder services (Basic Emergency Medical Service), while advance medical services are provided by American Medical Response (AMR) under contract with the San Joaquin County Emergency Medical Service (EMS) Agency.

Many of the fire agencies have jurisdictional boundaries located within the spheres of influence or planning horizon for neighboring cities. In these cases, portions of the agencies boundary are zero sphered in anticipation of future annexations. More details can be found in the 2011 Municipal Service Review Rural Fire Protection Districts San Joaquin County (<https://www.sjlafco.org/files/71b2b2e0b/rural-fire-districts-in-san-joaquin-county---october-2011.pdf>). In addition, a portion of the Delta which encompassed 540 residential units and a population of 2,400 in 2011 is without fire protection. The adjoining rural fire districts and the City of Stockton provide emergency medical response for life threatening incidences namely automobile accidents and for structure fires when life is endangered. The fire districts nor the City has any responsibility since this area is not within a fire district nor is it served by CALFIRE under a State Responsibility Area.

### **C) Name of Contact Person**

The awarded contracting consultants principal contact with SJLAFCo will be the Executive Officer, J.D. Hightower, and will coordinate the services to be provided. Mr. Hightower may be contacted at (209)468-3198 or via email at [jhightower@sjgov.org](mailto:jhightower@sjgov.org)

## **III) Scope of Services**

A discussion on the study's scope of service as currently envisioned by LAFCO is included immediately below. A final scope of services will be negotiated with the firm selected to conduct these service reviews and will be included with the professional services agreement to be approved by LAFCO.

### **A) Study Requirements**

San Joaquin LAFCO is seeking a study that provides well-founded and achievable recommendations. The study will include:

1. Rural Fire Protection Districts Alternative Governance Study
  - a. Develop alternative governance and service delivery models aimed at enhancing efficiency and effectiveness based on information provided in the service evaluation and analysis. Please include the below alternatives that would follow a similar model to the existing South County Fire Authority:
    1. Creation of a North County Fire Authority that includes the City of Lodi, Liberty FPD, Woodbridge FPD, Mokelumne FPD, Thornton FPD and Clements FPD.

2. Creation of a Central County Fire Authority that includes the City of Stockton, Montezuma FPD, Waterloo-Morada FPD, Colleeville FPD, Farmington FPD, Linden-Peters FPD and French-Camp McKinley FPD.
3. Creation of a Southeast County Fire Authority that includes the City of Manteca, Lathrop-Manteca FPD, Ripon Consolidated FPD, and Escalon Consolidated FPD.

Other alternatives could include reorganizations, annexations, and dissolutions of agencies.

- b. Conduct a detailed cost-benefit analysis of the proposed alternatives taking into account possible operational efficiencies and eliminated redundancies.
  - c. Recommend, as needed, new funding opportunities and financial strategies to sustain and improve services.
  - d. Determine the most feasible/cost effective model for the agencies to consider.
  - e. Include a plan of implementation for the recommended alternative governance model.
2. Service Evaluation and Analysis. Conduct a streamlined service review of fire protection and emergency medical services for each of the 19 fire protection districts. For each agency:
- a. Assess the level of current services, including response times, infrastructure, service coverage areas, equipment, and personnel.
  - b. Analyze operational structures, governance frameworks, policies, and staffing levels of each agency.
  - c. Perform a financial analysis, including operating budgets, revenues, expenses, debt obligations (including pensions), and funding sources.
  - d. Project a five-year financial forecast considering anticipated population growth and service demand changes for each agency.

The CKH Act requires LAFCO to prepare an analysis of each Fire Protection District and a written statement of determinations with respect to each of the following:

- (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.

*(Note: several of these elements overlap in terms of subject matter. The report may consolidate sections, but should provide a set of recommended determinations that indicate the required element to which they apply.)*

San Joaquin LAFCO outlines its methodology guidelines for preparation of municipal service reviews as part of its Application Submission Policies. These can be found on the LAFCO website: <https://www.sjlafco.org/policies-and-procedures>. The Governor's Office of Planning and Research has additional information for preparing service reviews.

**B) Important considerations:**

- The consultant must be well versed in local government finance in California in order to study the issue and provide viable, actionable recommendations regarding governmental changes, including annexations and consolidations.
- Several communities in the study area consist of small-lot subdivisions on private wells. Some developments are in rural, isolated areas with irrigated farmland, dairies, and pasture. The consultant must be mindful of these characteristics when evaluating service.
- A portion of the County is currently without fire services. The proposed alternative governance options should include the extension of services into these areas through either amending the

boundaries/spheres of influence of neighboring districts or establishing a fire district for the entire area.

San Joaquin LAFCO has compiled some information that will be made available to the qualified applicant if necessary. The report should reflect local LAFCO policies. Specific information can be found on the LAFCO website.

The consultant is expected to use any and all available information relevant to the Alternative Governance and Service Review Study, including interviews, surveys, previous research, reports, District planning documents, County general plans, previous sphere studies, authorities under the law, etc. Sufficient data and information should be collected to construct a clear, concise and comprehensive report. LAFCO desires to focus efforts on a respective district's capacity and capability to provide services and an objective assessment of its financing and governmental structures. It is therefore important for a proposal to demonstrate an approach that gets to the relevant discussion without becoming a huge compendium of information.

### **C) Process**

Preparation of the Alternative Governance and Service Review Study will include the following steps:

- Data collection, including but not limited to, interviews, surveys and research of existing information and documents including past service review and SOI studies, past organization records, and other research
- Interpretation and analysis
- Produce an administrative draft of the Study with appropriate and actionable recommendations for LAFCO staff and fire agency staff to review. The Study must be readable and suitable for use by elected officials, service providers and the public. The consultant shall present issues in the most succinct manner possible while including necessary content and ensuring readability
- Produce a Draft Study addressing the comments from the administrative draft.
- Presentation of draft report to San Joaquin LAFCO for distribution to affected and interested agencies for comment
- Review of draft report by Commission, County Board of Supervisors, affected/interested agencies and the public

- Preparation of final draft addressing comments from LAFCO Commission, LAFCO staff, affected/interested agencies and the public, including findings, determinations and recommendations
- Consultant will present the final report to LAFCO Commission at a public hearing
- Commission's adoption of final report and determinations
- Organize supporting documents to be delivered to San Joaquin LAFCO.

Consultant must deliver to LAFCO a MSWord formatted version and a PDF formatted version of the Study for each stage of the process. San Joaquin LAFCO is committed to a study that is conducted in a fair, accurate and objective manner. The Commission wishes to provide effective and meaningful opportunities for public participation in the review process. The intent is to provide valuable and practical conclusions for

- Improvements to service provision where possible
- Possible reorganizations and changes to organizations where feasible
- Long term stabilization of financing for all agencies.

#### **D) Data**

To the extent appropriate and feasible, research for preparation of the alternative governance and service review study should include the following sources and subjects. LAFCO will make available as many resources, data and information at its disposal; however, the consultant is expected to gather data from the agencies or other sources if necessary. Other information will be specific to the agencies affected by the service review.

- Principal acts
- General plans/zoning ordinances
- Recent and proposed projects
- Master service plans
- Agency maps
- District/city policies governing financing and personnel
- Board, management and administrative manuals/procedures
- Existing spheres of influence
- Demographic information



- Projected growth
- Communities of interest
- Regional agencies providing support
- Criteria/best practices as used by appropriate industry groups
- Capital improvement plans
- Existing operating/capital improvement budgets
- Environmental impact reports, if applicable and/or available
- Existing joint agreements and contracts
- Current and planned financing plans for service upgrades and capacity improvements
- Agency bond ratings
- Agency investment policies, if applicable
- Joint financing/shared facilities
- Agency budgets and financial reports, including revenue sources and expenditures
- District cost avoidance practices
- Insurance
- Customer needs and preferences
- Per unit service cost
- Competitive bid policies
- Comparable rate information
- Current organizational chart
- Mission statement
- Continuing education/training
- Staffing levels
- Opportunity for customer comments
- Available revenues
- Amounts and types of reserves
- Adopted policies for reserves
- Asset disposition plan

- Property tax increment (AB 8 share)/Gann limit
- Surplus property policies
- Board policies and practices
- Days/hours of operation
- Annual reports/status reports
- Newsletters
- Voter participation

These data should result in an Alternative Governance and Service Review Study that addresses the Scope of Services listed at the beginning of this section and these data should result in a report that:

- a) Provides flexible and creative alternatives for agencies in need of new service options
- b) Provides logical and reasonable recommendations, yet also makes innovative suggestions for solutions to service and policy issues
- c) Includes the appropriate charts, graphs and maps to provide clear and organized documentation for its findings, conclusions and recommendations
- d) Includes recommended findings, conclusions and actions to present to the Commission for their determination based on the research done in this study.

#### **IV) Budget:**

*Proposals from qualified firms that demonstrate that the final product will meet the requirements of the CKH Act and provide useful information in a concise format at the lowest cost will be looked upon in a favorable light. A final budget amount for this project will be negotiated with the firm selected for the work prior to an agreement being recommended to LAFCO for adoption.*

#### **V) Schedule:**

The final schedule for this project will be negotiated with the firm selected for the work prior to an agreement being recommended to LAFCO for adoption.

## **VI) Proposal Requirements:**

Your proposal must provide the following information:

**A) Submittal Outside Cover Title** – Include the RFP title, submittal due date, and the name, address, and telephone number of principal submitting firm.

**B) Cover Letter** – Provide a brief (maximum of two pages) submittal cover letter. State any changes to the format or deletions of requested materials, which may be a part of the submittal. Include a summary describing how the submitter proposes to provide the required services to the Commission.

**C) Identification of Responder.**

- 1) Provide the legal name and address of the submitter.
- 2) State the legal form of the submitter, i.e. partnership, corporation, joint venture, and so forth. If the submitter is a joint venture, identify the members of the joint venture team and provide all information required under this section for each member. If the submitter is a wholly owned subsidiary of a parent company, identify the parent company and its address.
- 3) Provide the name, title, address, and telephone number of submitter's principal contact person for the RFP.

**D) Qualifications of the firm including:**

- 1) A statement about the firm that describes history, competencies and résumés of the principal and of all professionals who will be involved in the work. This statement should address the following criteria:
  - A management level understanding of how fire and emergency services are financed and delivered
  - Expertise with national fire and emergency medical services standards such as NFPA 1710, NFPA 1720, Center for Public Safety Excellence 6th Edition Community Risk Assessment: Standards of Cover, and other national standards.
  - Experience with the operations of fire department, including recruitment, retention and training of firefighters at various levels of medical service education (first responder, basic life support, paramedic, etc.)
  - Experience in governmental organization analysis, including performance measurement and evaluation

- Expertise with laws governing California local government agencies.
  - Experience with the CKH Act, the role and functions of LAFCO, the service review, SOI process, and reorganizations, including consolidations, annexations, detachments, dissolutions, and activating and divesting latent powers
  - Ability to facilitate and synthesize input from a variety of sources
  - Ability to interpret varied budget and planning documents
  - Experience in identifying and fostering multi-agency cooperation
  - Public input processes and handling the presentation and dissemination of information to local agencies and the public for review and comment
  - The ability to work cooperatively with divergent interests
  - A substantiated statement of the firm's or individual's qualifications to perform the work, ability to stay within budget and meet deadlines
- 2) Identification and designation of the individuals who would be available to perform the work, including résumés documenting their experience and competence to perform that work.
  - 3) Identification of any sub-consultants who will be involved. If sub-consultants are proposed, describe the work they will perform and include the same information for each sub-consultant as required for items 1 and 2 above.
  - 4) Information about the availability of all the professionals who will be involved in the work, including any sub-consultants.
  - 5) A statement of similar or related experience accomplished in the last five years and references for each such project, including the contact name, address and telephone number.
  - 6) Description of the anticipated approach for this project, explicitly discussing and identifying any suggested changes to the draft scope of services (see Section III above).
  - 7) Disclosure of potential conflicts of interest with local agencies in San Joaquin County.

- 8) Identification of any information, materials and/or work assistance required from San Joaquin LAFCO to complete the project.
- 9) Project schedule, including the timing of each work task.
- 10) The anticipated project cost, including:
  - (a) A not-to-exceed total budget amount
  - (b) The cost for each major sub-task identified in the draft scope of services
  - (c) The hourly rates for each person who will be involved in the work, including the rates for any sub-consultants

**E) Other Information Required in Proposal**

The firm shall make a positive statement that it has the required insurance policies in force in acceptable amounts of coverage for Professional Liability, Workers Compensation, Comprehensive General Liability and Auto (Owned and Non-Owned). Prior to any commencement of services, the firm will be required to provide certificates of insurance coverage to LAFCO.

**VII) Submittal Requirements**

No faxed proposals will be accepted. Proposals received after the deadline will not be considered.

**A) Authorization** – The submittal shall be signed by an individual or individuals authorized to execute legal documents on behalf of the submitter.

**B) Sealing and Delivery** – proposals must be received electronically in Adobe (.pdf format) submitted to [jhightower@sjgov.org](mailto:jhightower@sjgov.org) or hard copy (2 copies) on or before, November 18, 2024, at 3:00 p.m. at the office of:

San Joaquin Local Agency Formation Commission  
Attn: J.D. Hightower, Executive Officer  
44 North San Joaquin Street, Suite 374  
Stockton, CA 95202

**C) Compliance**

- 1) Failure to substantially comply with the requirements of this RFP may result in submitter's RFP submittal not being considered.

- 2) SJLAFCo reserves the right to revise this RFP prior to the due date. Revisions to the RFP shall be mailed to all holders of record.
- 3) SJLAFCo will answer questions submitted in writing in the form of Addendum to be issued to all holders of record and posted online no later than three (3) days prior to the submittal deadline. All questions should be submitted to [jhightower@sjgov.org](mailto:jhightower@sjgov.org).
- 4) SJLAFCo reserves the right to extend the date by which the submittals are due.

### **VIII) Evaluation Criteria:**

Proposals will be evaluated based upon their response to the provisions of this Request for Proposal and by the following criteria:

- Expertise with the provision of fire and emergency services and running a fire department
- Ability to work with pertinent parties and knowledgeable experts
- Ability to demonstrate or provide viable strategies to public agencies
- Provide detailed outline of cost estimates

*Please note that this will be a competitive selection process.*

Based on the criteria above, the completeness of the responses, cost and the overall project approach identified in the proposals received, the most qualified firms will be invited, at their expense, for an interview with the selection committee. The selection committee may be composed of Commissioners, the Executive Officer, other LAFCO staff and possibly representatives from the agencies.

Following interviews, the most qualified firm will be selected and a recommended agreement including budget, schedule and a scope of services will be negotiated. Final selection will be made by LAFCO by approving a professional services agreement for the work.

### **IX) Terms and Conditions**

- A) This RFP does not commit SJLAFCo to award a contract or contracts, to defray any cost incurred in the preparation of a response to this request, or to procure or contract for services. All submittals become the property of SJLAFCo as public records. All submittals may be subject to public review on request, unless exempted.
- B) SJLAFCo reserves the right to negotiate and award any element of this RFP, to reject any or all proposals or to waive any minor

irregularities or technicalities in proposals received as the best interest of SJLAFCo.

- C) SJLAFCo reserves the right to cancel, in part or in its entirety, this RFP including, but not limited to, selection schedule, submittal date and submittal requirements. If SJLAFCo cancels or revises the RFP, the Executive Officer or designee will notify all respondents of record in writing.
- D) SJLAFCo reserves the right to request additional information and/or clarifications from any or all respondents to this RFP.
- E) Respondent will be responsible for all costs incurred in preparing a response to this RFP. All material and documents submitted will become the property of SJLAFCo and will not be returned.

# Attachment 2

## REQUEST FOR PROPOSAL

### FIRE AND EMERGENCY SERVICES IN RURAL SAN JOAQUIN COUNTY ALTERNATIVE GOVERNANCE STUDY AND SERVICE REVIEW STUDY

SAN JOAQUIN LAFCO

NOVEMBER 2024





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November 18, 2024

**Via Electronic Mail**

J.D. Hightower, Executive Officer  
SAN JOAQUIN LOCAL AGENCY FORMATION COMMISSION  
44 N. San Joaquin Street. Suite 374  
Stockton, CA. 95202

Dear Mr. Hightower:

In response to your October 23, 2024 Request for Proposals (“RFP”), RSG, Inc. (“RSG”), together with Planwest Partners, Inc. (“Planwest”) is pleased to present this proposal for consulting services to prepare an alternative governance model study (“Study”) and municipal service review (“MSR”) for the nineteen (19) fire protection and emergency medical service providers in San Joaquin County (“County”) on behalf of the San Joaquin Local Agency Formation Commission (“LAFCO” or “Commission”). RSG understands the objective of this project is to offer the Commission a thorough evaluation of fire protection and emergency medical service delivery in the County, including infrastructure, financial sustainability, and the potential for improved organizational structures.

The Study and MSR will be used to inform the Commission of plausible alternative service delivery options for fire protection and emergency medical services and potential updates to the agencies’ SOI and/or boundary including possible reorganization, dissolutions or consolidations. RSG will conduct the MSR in accordance with Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (“CKH”) and applicable LAFCO policies.

RSG is committed to collaborating closely with LAFCO staff to refine our proposed scope and budget, ensuring it aligns with LAFCO’s priorities and resources while delivering the high-quality outcomes expected. Our approach will involve two primary phases as discussed in the Scope of Services and as detailed below. The anticipated budget for the alternative governance study and municipal service review is **\$190,245**.

1. **Alternative Governance Study:** RSG will conduct an in-depth analysis of each district’s infrastructure and service capabilities within unincorporated San Joaquin County. We will perform a comparative financial analysis across the 19 fire protection districts, identifying efficiencies and opportunities for restructuring. We will evaluate the three potential joint powers authorities outlined in the RFP, and potentially other alternative governance structures. Our team will recommend alternative governance models or organizational changes that could enhance service delivery and financial viability in alignment with LAFCO’s goals.
2. **Service Review Study:** The second phase will involve a streamlined service review for each district. This will encompass the five-year financial forecast and a statement of determinations, as mandated by the CKH Act and LAFCO policies. RSG will assess each district’s capacity to meet current and future service demands, highlighting strengths and areas for improvement.

Based on our review of the RFP, the nineteen (19) fire and emergency medical service providers in the County and subject to evaluation in our studies include the following:

- Boggs Tract Fire Protection District
- Clements Rural Fire Protection District
- Colleeville Fire Protection District
- Eastside Fire Protection District
- Escalon Fire Protection District
- Farmington Fire Protection District
- French Camp-McKinley Fire Protection District
- Lathrop-Manteca Fire Protection District
- Liberty Fire Protection District
- Lincoln Fire Protection District
- Linden-Peters Fire Protection District
- Mokelumne Rural County Fire Protection District
- Montezuma Fire Protection District
- Ripon Fire Protection District
- Thornton Fire Protection District
- Tracy Rural Fire Protection District
- Tuxedo-Country Club Fire Protection District
- Waterloo-Morada Fire Protection District
- Woodbridge Fire Protection District

Our team brings extensive experience in public sector consulting, with a proven track record with local agency formation commissions in governance studies, fiscal analysis, and strategic restructuring. RSG is prepared to deliver actionable insights and innovative solutions tailored to the needs of San Joaquin County and its fire protection districts.

We recently teamed with Planwest to complete a feasibility study for a new fire protection district in Eastern Plumas County, which was highlighted at the 2024 CALAFCO Staff Workshop. RSG and Planwest recently completed the Countywide Fire MSR covering 31 districts in Siskiyou County, and we are also currently preparing a Fire and Emergency Medical Services MSR for Sutter County LAFCO.

Both RSG and Planwest have extensive knowledge of and experience working with the provisions of the CKH Act, and related legislative updates. RSG is proud to be active members of the California Association of Local Agency Formation Commissions ("CALAFCO"), where RSG's Jim Simon, Brandon Fender, and Carol Ieromnimon are honored to serve as Advisory members of the CALAFCO Legislative Committee, which provides the CALAFCO Board with direction and analysis of legislative updates to the CKH Act. Planwest was also named an Outstanding Associate Member by CALAFCO in 2021.

This proposal remains valid for 90 days following the proposal submission deadline. RSG and Planwest disclose that they have no conflicts of interest that exist.

Should you wish to discuss any of the information presented, please contact me directly at [jsimon@rsgsolutions.com](mailto:jsimon@rsgsolutions.com) or by phone at 714.316.2120.

Respectfully,

RSG, Inc.

A handwritten signature in black ink, appearing to read "Jim Simon". The signature is fluid and cursive, with a horizontal line extending from the end.

Jim Simon, Principal

## FIRM DESCRIPTION AND SUMMARY OF QUALIFICATIONS

### ABOUT RSG

RSG, Inc. is a California-based, Subchapter "S" Corporation. Founded in 1979, the firm is currently managed by active Principals Jim Simon and Tara Matthews and has a staff of 30 employees. RSG's corporate address is 170 Eucalyptus Ave., Suite 200 Vista, CA 92084, and we have three hubs in California, including San Diego, Los Angeles, and Oakland, where we collaborate periodically as a team to accommodate the needs of our clients and growing firm.

RSG is a creatively charged consultant to California public agencies. We collaborate with the people responsible for creating vibrant places to accomplish their goals. The inspired leaders at RSG create stronger communities capable of achieving bolder futures by bringing more than four decades of native knowledge to each engagement. As diverse as the agencies we work with, our services span real estate, economic development, fiscal health, and housing initiatives.

RSG is a California licensed real estate broker (DRE License No. 01930929) and a Small Business Enterprise ("SBE") certified by the California Department of General Services (Certification ID 2006876). RSG's federal taxpayer identification number is 95-343-5849 and state taxpayer identification number is 27600915.

### Insurance

RSG affirms that it has the required insurance policies in place through Hartford Insurance. These policies provide coverage in acceptable amounts for Professional Liability, Workers Compensation, Comprehensive General Liability, and Auto (Owned and Non-Owned). Prior to the commencement of services, RSG will furnish certificates of insurance coverage to LAFCO to verify compliance with insurance requirements.

Our insurance providers rank in the excellence category for AM Best Rating Services. A Certificate of Insurance with applicable endorsements will be provided upon contract award.

### Mission Statement and Core Values

RSG creates solutions to enhance communities' physical, economic, and social future.

Our core values define who we are as people and the standards by which we provide services to our clients. At RSG, we:



## RECENT EXPERIENCE

RSG has prepared comprehensive fiscal analyses and feasibility studies to support incorporations, most recently leading to the formation of California's newest city – Mountain House. We have experience preparing municipal service reviews of cities, fire districts, and special districts, including the Siskiyou County LAFCO Countywide Fire MSR and SOI update, which is expected to be adopted at the Commission's October meeting, and Sutter County LAFCO Countywide Fire and EMS MSR and SOI update, which is currently in progress. We have completed annexation studies, reorganizational studies, operational studies, and other fiscal and economic impact analyses.

Planwest Partners, Inc. offers experience working with special districts and cities throughout California and providing a wide range of LAFCO services, including MSRs, feasibility studies, and plans for changes of organization or reorganization proposals. Recently, Planwest assisted with the consolidation of two fire districts in northeastern Shasta County, the annexation and consolidation of three volunteer fire companies to an existing fire protection district in Humboldt County along with several other fire related district formations and annexations requiring special tax approval, the successful passage of a special assessment for an existing fire protection district in Del Norte County, and the formation of a special district for EMS services in Trinity County.

### **RSG Qualifications**

RSG's fiscal health services include:

- Preparation of municipal service reviews and special studies
- Evaluating reorganization, annexation or incorporation proposals
- Studying fiscal impacts and developing financial projections
- Community engagement, and
- Expanding financial capacity

RSG has provided cutting-edge solutions for local government agencies, including outsourcing, shared service studies, and long-range fiscal planning. We have helped LAFCOs develop policies for island annexations and have worked with cities on crafting a viable path in delivering services to areas in their sphere of influence. We have helped cities understand how they need to restructure the services they deliver, and the manner in which they evaluate how they will take discretionary actions in the future. With our assistance, our clients have been able to instill more fiscal discipline at all levels of their organization, become more effective, and have staff engaged in identifying solutions that meet the strategic needs of their community.

Our experience working with LAFCOs around the state has allowed us to participate in the MSR process and observe the variety of ways MSRs can be used to meet LAFCOs' goals. In some situations, a lack of growth pressure or lack of significant changes in service levels do not warrant an extensive review and a "checklist" approach is sufficient to reaffirm an existing SOI. In other situations, a comprehensive, in-depth analysis of demographic trends, financial data, infrastructure capacity/conditions, rate structures, service extension barriers for disadvantaged unincorporated communities, and shared service delivery alternatives is warranted to lay the groundwork for SOI updates and/or imminent changes of

(re)organization. And when political considerations impact agencies, the MSR is a necessary tool that allows LAFCO to play independent facilitator and evaluator to bring parties together around common data and agreement points.

### **Planwest Qualifications**

Planwest has extensive LAFCO experience, providing LAFCO staffing services in Humboldt, Del Norte, Trinity and Shasta LAFCOs. Our team brings extensive experience working with agencies across the state on various reorganizations, including annexations, formations, consolidations, and more. We have a strong background in LAFCO processes, with a staff that includes seasoned analysts, clerks, and executive officers.

Planwest has assisted with dozens of MSR/SOI updates and numerous applications for reorganization. We understand that successful reorganizations provide more sustainable governance structures, cost savings through economies of scale, and more efficient provision of services. We develop feasibility studies, plan for services, and other application materials that are a resource to the public and allow service providers to effectively pursue reorganization.

Planwest offers a broad range of professional skills including:

- LAFCO Services, MSR/SOI Updates, & Application Assistance
- Environmental Planning (CEQA & NEPA Compliance)
- General, Master and Specific Plans
- Zoning & Permitting
- City and Tribal Economic Development Plans
- Strategic Planning & Visioning
- Community Outreach & Facilitation
- Grant Writing & Project Management
- GIS Mapping & Data Management
- Transportation and Climate Action Planning
- Technical Assistance to Water/Wastewater & Fire/EMS Providers
- Housing Element Updates

At Planwest, their expertise spans Northern California and beyond, with a deep-rooted commitment to enhancing the quality of life for the communities we serve.

### **PLANWEST PARTNERS, INC. – SUBCONSULTANT**

Planwest Partners is a professional services consulting firm based in Arcata, California. Established in 1997, Planwest provides a comprehensive range of services including community, land use, environmental, economic, and transportation planning services in addition to LAFCO executive officer services for four counties in northern California. We are dedicated to fostering collaboration with clients and communities to deliver outcomes that advance efficient service delivery, sustainable growth, inclusive housing opportunities, economic resilience, and environmental stewardship.

Incorporated as a California “C” corporation, Planwest transitioned ownership in 2021, with Vanessa Blodgett and Colette Santsche joining founder George Williamson as owners. Vanessa and Colette now hold a majority company ownership, establishing Planwest a women-owned business. Currently our firm has 25 active clients and consists of 11 staff

members. Our multidisciplinary planning team offers a diverse skillset tailored to address a wide array of client needs.

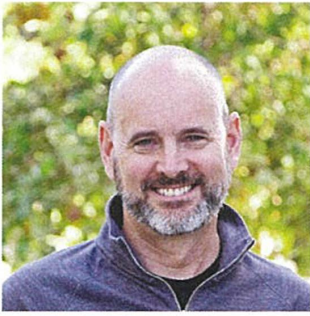
#### KEY TEAM MEMBERS

RSG dedicates a Principal to each project assignment and creates a core group of staff who work on the individual assignments on a consistent basis throughout all stages of the contract engagement. Our staff is focused, committed, and passionate about the work we do. We conduct our engagements around our Core Values and are proud of it. We pride ourselves on our ability to appropriately allocate our time and resources to ensure that a project is completed on time and within budget.

RSG has assigned members of our consulting team, all with experience working on projects similar in scope to what has been proposed by the City. The team would be led by Jim Simon, Principal. Mr. Simon would be assisted by Brandon Fender, Senior Associate, Carol Ieromnimon, Associate, and Jillian Glickman, Senior Analyst. Additional RSG staff will be assigned as needed.

The Planwest team will include Colette Santsche AICP, Principal Planner, John Miller, Senior Advisor, Krystle Heaney AICP, Senior Planner, and Louis Choy, GIS Analyst. Additional Planwest staff will be assigned as needed. The Planwest team also includes retired fire chief Bill Gillespie who we team with regularly on fire service MSRs. Bill's lifelong career in the fire service as chief for Eureka Fire Department including overseeing the merger with Humboldt No. 1 Fire Protection District to establish the Humboldt Bay Fire Authority, and as chief for Crescent City Fire & Rescue provides the knowledge and technical experience often needed when working one-on-one with fire department personnel.

Resumes of key consulting staff assigned to this engagement are on the following pages.



# JIM SIMON

Principal & President

714.316.2120  
jsimon@rsgsolutions.com

## PROFILE

“With determination and imagination, I serve myself and others to discover our capacity for what is possible by designing solutions for a complex world so we can cherish and nurture our communities.”

## OUT & ABOUT

California Association for Local Economic Development (CALED) 40 at 40 Honoree for contributions to California Economic Development

“Business Retention and Attraction” – Advanced Certification Program Instructor (CALED)

“Community Economic Development” – Keys Program

Legislative Committee and 2024 Conference Committee for California Association of Local Agency Formation Commissions (CALAFCO)

International Council of Shopping Centers (ICSC)

Housing California

Southern California Association of Non-Profit Housing (SCANPH)

San Diego Housing Federation (SDHF)

Urban Land Institute (ULI)

## ABOUT JIM

Inspired to improve the Golden State in his work, Jim delivers intelligence, innovation, and passion to projects requiring his unparalleled expertise in fiscal health, real estate, and economic development. For over 30 years, Jim is proud to have led projects that have resulted in the investment of over \$10 billion in private and public capital, transforming cities and communities across California. As President of RSG, Jim is helping to shape the next generation of the firm’s legacy - leading RSG’s team of inspired, creative, and insightful consultants that serve over 100 communities each year.

## EDUCATION

Jim joined RSG in 1991 and has served as a Principal and shareholder since 2001. He received a BA in Business Administration with a concentration in entrepreneurial management from California State University, Fullerton. In 2014, Jim was selected as an Advisory Board member of the California Association for Local Economic Development, where he serves as Co-Chair of CALED’s Economic Development, Real Estate and Finance technical committee. Jim is also an Advisory member of the Legislative Committee for the California Association of LAFCOs (CALAFCO), and active in other professional organizations including NAIOP, ICSC, NPH, and SCANPH.

## RECENT ENGAGEMENTS

Oversaw the Comprehensive Fiscal Analysis and led the Cityhood Incorporation Resident Workshop for the Town of Mountain House for San Joaquin LAFCO, who unanimously approved the incorporation application to advance it to the voters, who then approved in March 2024.

Prepared fiscal impact analysis for several annexations proposals within city SOIs, including Martinez, San Carlos, Huntington Beach, and Belmont.

Prepared the 2020 Municipal Services Review and SOI Update for the Consolidated Fire Protection District of Los Angeles County, the largest special district in California, for LA LAFCO.

Led the preparation of a MSR for the 28 cities in Riverside County, provided MSR and SOI updates for 13 cities and 12 special districts for Orange County LAFCO, and provided MSR and SOI updates for 4 cities for LA LAFCO.







# BRANDON FENDER

Senior Associate

714.316.2106  
bfender@rsgsolutions.com

## EIFPROFILE

"I enjoy creating equitable and sustainable urban spaces for communities. I thrive in a challenging environment and seek to provide innovative solutions."

## OUT & ABOUT

Advisory Board member for the CALAFCO Legislative Committee

Associate Member of Urban Land Institute

International Council of Shopping Centers

Housing California

Southern California Association of Non-Profit Housing (SCANPH)

San Diego Housing Federation (SDHF)

California Association of Local Agency Formation Commissions (CALAFCO)

## ABOUT BRANDON

Brandon specializes in providing support in real estate feasibility, economic and fiscal impact analyses, and housing administration. He is most engaged when his research translates to solutions for local governments and access to healthy and safe environments for their citizens.

In 2014, Brandon became an entrepreneur, starting the Good Beer Company, the first brewery and tasting room in Santa Ana. After five years of success from concept to business plan and fundraising, to opening a warehouse location, Brandon sold the brewery and returned to RSG, with a direct appreciation for the life of the small business owner which he applies to his work at the firm.

## EDUCATION

Brandon initially joined RSG in 2009 while attending the University of California, Irvine where he earned a BA in Social Ecology. As a member of numerous project teams, Brandon gained experience in housing administration, economic and market analyses, housing construction and development, municipal finance, and development feasibility.

## RECENT ENGAGEMENTS

Assisting with a Siskiyou County LAFCO Countywide Fire MSR as well as a Sutter County LAFCO Countywide Fire and EMS MSR.

Assisted Riverside LAFCO with a municipal services review for the 28 cities in Riverside County. RSG's study included a focused review of the most rapidly growing region in California, and included thorough municipal service review determinations and sphere of influence recommendations.

Provided detailed fiscal impact analysis and advisory services for the proposed Bolsa Chica Annexation by the City of Huntington Beach. The analysis included estimated fiscal impacts associated with existing environmental issues in the Bolsa Chica wetlands, including ongoing oil extraction operations and impending threat of sea-level rise.

Developed a methodology for a Municipal Service Review for LA LAFCO that sought to inform service and sphere of influence recommendations for a joint sphere of influence between the cities of Whittier and La Mirada.





# CAROL JEROMNIMON

Associate

714.316.2197  
cieromnimon@rsgsolutions.com

## PROFILE

“I find success in helping others find success. Creating meaningful relationships and collaborating with others to achieve a goal is where most of my passion lies. By applying my skillsets and experience to my role with RSG, I hope to further enhance communities and empower others.”

## OUT & ABOUT

Member, CALAFCO Legislative Committee

Housing California

Southern California Association of Non-Profit Housing (SCANPH)

San Diego Housing Federation (SDHF)

California Association of Local Agency Formation Commissions (CALAFCO)

## ABOUT CAROL

Carol joined the RSG team in 2024 and brought with her a background in local government and economic development. Her experience in the intricacies of municipal boundary adjustments, research and analysis, grant administration, underwriting, public speaking as well as project management empowers her to further facilitate the efficient growth and prosperity of communities across the state. Her passion in creating meaningful relationships and making a difference in the communities she serves propels her to deliver results, provide solutions, and embrace new challenges.

## EDUCATION

Carol holds a Bachelor of Science Degree in Sociology from the University of California, Riverside as well as a Master’s Degree in Public Administration from California State University, Long Beach. Carol served as an Advisory Member to the SANDAG Communities Working Group between 2023-2024 and is currently an Advisory Member of the Legislative Committee for the California Association of LAFCOs (CALAFCO).

## RECENT ENGAGEMENTS

Conducting a reorganization study of two legal parcels in Napa County on behalf of the Town of Yountville.

Preparing the Municipal Service Review on behalf of Placer County involving the South Placer Municipal Utility District.

Performing a service delivery study for Placer County involving the Placer Vineyards Park and Recreation District.

Assisted in the preparation of the Municipal Service Review on behalf of Alameda LAFCO involving the community services districts in Alameda County.

Assisted with the review of fiscal impacts associated with proposed residential development for communities in the City of Costa Mesa and neighborhood of Orangethorpe.

Facilitated the preparation of the Municipal Service Review on behalf of Siskiyou LAFCO involving the fire protection service providers in Siskiyou County.





# JILLIAN GLICKMAN

Senior Analyst

714.316.2142  
jglickman@rsgsolutions.com

## PROFILE

"I am passionate about creating tangible impacts in individuals' lives through sustainable development initiatives. I am at my best when solving problems that require pragmatic yet innovative approaches."

## OUT & ABOUT

- Housing California
- Southern California Association of Non-Profit Housing (SCANPH)
- San Diego Housing Federation (SDHF)
- California Association of Local Agency Formation Commissions (CALAFCO)

## ABOUT JILLIAN

Jillian joined RSG in 2022 and is a lifelong Southern California resident. She seeks to address multifaceted issues facing local governments by implementing rigorous research initiatives and thorough analyses. Her role as an undergraduate research assistant has given her intensive experience in qualitative research, large-scale project execution, and team leadership.

## EDUCATION

Jillian holds a BA in Political Economy with a minor in Environmental Studies from the University of Southern California. Jillian's multidisciplinary educational background has provided her with a unique understanding of the interplay between politics, economics, and sustainability.

## RECENT ENGAGEMENTS

- Conducted a peer cities analysis as part of a Comprehensive Fiscal Analysis for the City of Mountain House incorporation for San Joaquin LAFCo. Drafted Terms and Conditions for the incorporation.
- Engaged 25+ fire protection service providers in Siskiyou County to gather information regarding efficient service delivery. Prepared an Administrative Draft of a Fire Municipal Service Review and Sphere of Influence Update for Siskiyou County LAFCo.
- Gathered and synthesized relevant information on four cities in LA County for their Municipal Service Reviews. Lead outreach efforts to cities and facilitated the exchange of information between cities and our internal team.
- Prepared a 20-year tax revenue forecast for major developments currently under construction in the City of Irwindale.
- Evaluated and analyzed various financial documents to complete annual Housing Authority and SB 341 reports for the cities of Murrieta, Moreno Valley, and Camarillo.
- Prepared a Project Comparison Matrix for the City of Norco to review Developer Qualifications and Experience for a developer proposing a for-sale affordable housing project.



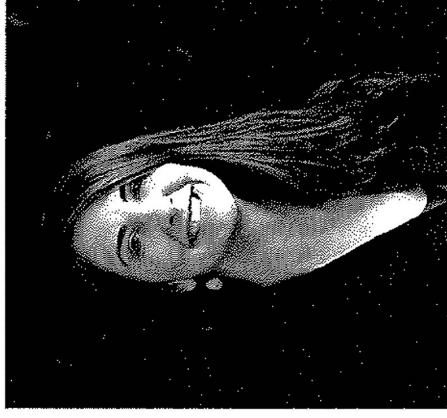
## Colette Santsche Partner/Principal Planner, AICP



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 for LAFCo action involving changes of governmental organization and reorganization, such as district fire district formations and annexations. Represents LAFCo at stakeholder meetings and makes presentations to LAFCo and other local governments at public hearings.
- **Regional Fire Services Municipal Service Reviews.** *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.
- **Fire Services Sustainability Technical Assistance.** *Humboldt LAFCo.* Part of a technical assistance team focused on sustainable community fire protection to address the lack of complete community coverage and sustainable revenue. Supported by funding from the Humboldt County Fire Chiefs Association through a portion of Measure Z funds, the technical assistance team meets weekly to support efforts to address the gap between local jurisdictional boundaries and where services are being demanded, as well as the lack of revenue to support increasing demand. Participates 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.



### 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/Rotactact, 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.
- **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.
- **Crescent City Fire and Rescue 10-Year Financial Master Plan.** *City of Crescent City and Crescent Fire Protection District.* Served as project manager for the CCFR Financial Master Plan, which identified the department's current and projected fire and emergency service needs and associated costs with delivering services over a 10-year period. Facilitated a series of meetings with a 2x2 committee representing elected officials from the department's parent agencies, as well as a select group of officers to reflect on the long-term direction of the department. Developed an Action Plan and cost projections for achieving increased administrative capacity, enhanced volunteer staffing programs, and a long-term schedule for apparatus and equipment replacement.
- **Crescent Fire Protection District Benefit Assessment.** *Crescent Fire Protection District.* Assisted the Crescent Fire Protection District receive property owner support for a benefit assessment to support increased staffing and funding. Established a team to complete community polling and the required Engineer's Report. Oversaw the noticing and balloting process in accordance with Prop 218, including developing the necessary resolutions, ordinances, and staff reports. Prepared informational materials for community education and outreach, including ballot information guide, mailings, social media and website materials.
- **Fortuna Fire Strategic Planning and Benefit Assessment.** *Fortuna Fire Protection District.* Assisted the Fortuna Fire Protection District in identifying short- and long-term staffing and capital improvements to be funded by a benefit assessment. Prepared the basis of an engineer's report and oversaw the notice and balloting in accordance with Prop 218. The District received sufficient property owner approval and has since implemented a fire prevention program, volunteer staffing stipends, a sleeper program, and constructed a training facility for the benefit of Eel River fire departments.

# WILLIAM “BILL” GILLESPIE

## EXPERIENCE

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### Crescent City Fire & Rescue – City of Crescent City & Crescent Fire Protection District

#### Fire Chief

April 2018 – June 2022

- Led Crescent City Fire & Rescue in all aspects of the Department as Fire Chief, including Administration, Operations, and Prevention.
- Developed and managed personnel, budget, purchasing, repair and maintenance.
- Provide duty coverage and response. Functioned as a team member at City, City/County EOC, Del Norte County Fire Chiefs, and worked effectively with Department and Volunteers, allied agencies, and community.
- Assisted with development and implementation of Fire Department Strategic Master Plan and helped to secure funding through passage of funding measures in City of Crescent City and Crescent Fire Protection District.

### Humboldt Bay Fire Joint Powers Authority

#### Fire Chief

February 2016 – November 2017

- Lead Humboldt Bay Fire JPA in all aspects of the Department
- Assistant Fire Chief – Operations & Prevention January 2015-- January 2016
- Managed and provided oversight and supervision to both Suppression & Prevention Division divisions.
- Member of the Administrative Team and Command Staff Team.
- Provided emergency response duty coverage and incident command.

### Eureka Fire Department

#### Assistant Fire Chief – Operations

September 2011—December 2014

- Managed and provided Suppression Division leadership, oversight, and supervision.
- Provided emergency response duty coverage and incident command.
- Helped lead department through a complete consolidation and Joint Powers Authority formation with neighboring fire district 2011-2015.

#### Interim Fire Chief

November 2010 – September 2011

- Led, planned, organized, managed, and provided oversight for all functions, divisions, and activities of the Fire Department.
- Provided emergency response duty coverage and incident command.

#### Assistant Fire Chief – Operations

May 2009 – November 2010

- Managed and provided Suppression Division oversight and supervision.
- Provided emergency response duty coverage and incident command.

Assistant Fire Chief – Fire Marshall	August 2007 – May 2009
<ul style="list-style-type: none"> <li>Managed, planed, and provided Prevention Division oversight and supervision.</li> <li>Conducted prevention activities and public education.</li> <li>Provided emergency response duty coverage and incident command.</li> </ul>	
Fire Captain II	April 2004 – July 2007
<ul style="list-style-type: none"> <li>Provided supervision to an entire shift and specialty Programs.</li> <li>Assigned to Suppression and Prevention programs.</li> <li>Served as Acting Fire Marshal.</li> </ul>	
Fire Captain	July 2002 – April 2004
Engineer	March 1998 – July 2002
Firefighter	March 1996 – March 1998
<b>Loleta Volunteer Fire Department</b>	March 1990 – February 1997
Firefighter, Lieutenant, Captain, Training Officer	
<b>California Department of Forestry and Fire Protection</b>	June 1987 – October 1995
LT. Fire Apparatus Engineer in Madera, Mariposa, Merced '94-95	
Firefighter in Humboldt/Del Norte '87-94	
Volunteer FF, County Service Area #4, Trinidad FFS	Nov 1988 – Jan 1993

## EDUCATION

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National Fire Academy, Emmitsburg, MD	
Executive Fire Officer	Awarded Feb 2016
Executive Planning	Completed Aug 2007
California State University Long Beach	Graduated Aug 2010
Bachelor of Science Degree in Occupational Studies – Vocational Arts	
Coastline Community College	Graduated Dec 2010
Associate in Arts Degree in American Studies	

## MEMBERSHIPS

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Member California Fire Chiefs Association, Past CalChiefs District 5 North Director 16-22  
 Rotary Club of Southwest Eureka (President Elect)  
 Humboldt Area Saltwater Anglers Board Member  
 Past President of Del Norte County Fire Chiefs Association  
 Past Vice President of Humboldt County Fire Chiefs Association  
 Past Member Humboldt County Disaster Planning Committee  
 Past Secretary Humboldt County Fire/Arson Investigation Unit  
 Past President Humboldt County Fire Prevention Officers Association  
 Past member Humboldt County Training Officers Association Community  
 Past Advisory Board Salvation Army of Humboldt County

## **SCOPE OF SERVICES**

### **BACKGROUND**

San Joaquin LAFCO seeks a comprehensive study to explore alternative governance models and operational improvements for rural fire protection districts in the county. The study's main objective is to propose feasible and sustainable models for enhancing the efficiency and effectiveness of fire protection and emergency services in San Joaquin County. Key governance alternatives to be analyzed include establishing North, Central, and Southeast County Fire Authorities, each composed of relevant fire protection districts and cities within the region. Additional alternative governance structures may be reviewed.

Additionally, the study will include a service evaluation and analysis for each of the 19 rural fire protection districts, assessing current services, governance, infrastructure, and financial health. This analysis will consider response times, staffing, equipment, operational structures, and finances to establish a baseline understanding of each district's performance. It will also include a five-year financial outlook based on historical revenues and expenditures, expected population growth and development, and anticipated or predicted service demand changes.

In line with the CKH Act, this comprehensive study will evaluate each district's capacity to meet service demands, the presence of disadvantaged communities, shared facility opportunities, and potential impacts on agricultural and open spaces. The final report will consolidate these findings into recommended determinations for each required element, aiding LAFCO in making informed governance and operational recommendations for fire protection services across San Joaquin County.

### **PROPOSED WORK PLAN**

#### **Understanding of Assignment**

The primary goal of this project is to explore alternative governance models for rural fire protection districts in San Joaquin County to enhance efficiency and service delivery. San Joaquin LAFCO seeks to evaluate options, including potentially creating regional fire authorities in North, Central, and Southeast County, or other reorganizational strategies such as annexations and dissolutions. Each alternative will undergo a cost-benefit analysis to assess potential operational efficiencies and redundancies, along with recommendations for funding and implementation to ensure sustainability and service improvement.

In addition to governance restructuring, the project aims to conduct a streamlined service evaluation for each of the 19 fire protection districts, examining current services, infrastructure, staffing, finances, and future needs. This includes forecasting demand changes based on population growth and assessing compliance with the CKH Act and LAFCO policies by analyzing factors like service capacity, financial health, shared facility opportunities, and impacts on disadvantaged communities. The study's findings will provide LAFCO with well-founded recommendations for effective fire protection governance across the county.

This letter of proposal outlines RSG's work program and associated fees for your consideration.

#### **Scope of Services**

The purpose of the alternative governance study will be to provide LAFCO with data-driven recommendations with respect to identifying the most efficient and effective service delivery



models for the fire and emergency medical service in San Joaquin County. For the purposes of this study, RSG would also assess the efficiency of service delivery under the existing service models for 19 existing rural fire and emergency medical service providers as well as at least 3 potential joint powers authorities. This also includes exploring any other relevant service models as identified by RSG and County staff.

We have organized our work program around two phases in the planning effort:

1. Alternative Governance Study
2. Service Review

RSG's scope of services is detailed below.

### **Phase 1: Alternative Governance Study**

#### Task 1.1: Kickoff Meeting and Background Research

RSG will coordinate and facilitate a kickoff meeting with County staff to discuss the scope of work, and to confirm goals, expectations, timeline, and any relevant background information. The kickoff meeting is important for developing a collective understanding of desired project outcomes and gaining an understanding of the frequency and form of expected communication throughout the duration of the project. Topics discussed during the kickoff meeting will include:

- Existing and future needs for fire and emergency medical services
- Conceptual alternative governance structures (as detailed in the RFP and below)
- A discussion of key MSR determinations and SOI recommendations from previous service reviews
- Discussion about any other organizational or special studies completed
- Discussion about the current contract arrangements and agency statuses
- Any other information relevant to the project

As part of the kickoff meeting, RSG will review and update the schedule for preparation of the alternative governance study and municipal service review. Other details may be added, and the schedule would be maintained for use by RSG, Planwest, and LAFCO staff throughout the engagement.

RSG will also use the kickoff meeting to review an initial data request. We hope that LAFCO staff will be able to connect RSG to resources or provide documentation, data, and materials to assist with the analyses.

#### Task 1.2: Advisory Committee

RSG, Planwest, and LAFCO staff will also use the kickoff meeting to discuss the timing, frequency, and makeup of the advisory committee. RSG and Planwest will collaborate with LAFCO staff on offering suggestions and input on these dimensions and then plan to lead the advisory committee meetings virtually. Our initial recommendation is to hold separate virtual advisory committee meetings at two key milestones in the process: the first workshop prior to agency interviews; and the second workshop after RSG and Planwest develop preliminary findings. A third advisory committee meeting or stakeholder meeting would be held prior to the public review period to take informal public comment prior to the Commission public

hearing. RSG and Planwest are open to discussing the timing and makeup of the advisory committee or stakeholder workshops. Attendees would be provided the option to submit comments in writing as well as verbally, and to engage via Zoom, to encourage maximum input and accessibility.

As an alternative to the advisory committee, and at LAFCO staff's discretion, the community engagement may also be configured to accommodate one or more stakeholder workshop. If LAFCO staff prefers one or more stakeholder workshop, RSG and Planwest would work with LAFCO staff to develop a program and recommended structure. Ideally, an advisory committee would be engaged early in the process, preferably during data collection and again after preparation of preliminary findings, so it is critical to engage advisory committee members early in the process.

RSG and Planwest would lead and facilitate the workshops, but the workshops would be formally hosted by LAFCO. RSG will circulate a draft agenda to LAFCO staff within one week prior to the advisory committee meetings. We would assign at least two staff members to attend each workshop, one to lead and a second to take notes and assist with logistics. At the conclusion of the workshops, RSG and Planwest would provide a brief memo summarizing the workshop including written comments, if any, from attendees. As appropriate, the memo would identify possible actions or agreements that emerged from the discussions.

### Task 1.3: Data Collection, Survey Instrument, and Interviews

As LAFCO staff knows, collection of GIS, demographic, fiscal, and economic data are critical at this early stage in order for the effective execution of district interviews and analysis. RSG and Planwest have already reviewed and obtained access to San Joaquin GIS shape files, and we would augment this spatial data with the County assessment roll, Department of Finance ("DOF") demographic data, the most recently-available fiscal transactions report data from the State Controller's Office ("SCO"), and other publicly available information. RSG and Planwest would collect, gather, analyze all pertinent information -including but not limited to – County General Plan, Community Plans, legislation, comparable special districts, LAFCO policies and guidelines, cost data, formation documents, budgets, annual reports, strategic documents, development agreements, and fee schedules, if available.

Using this information, we will compile data profiles and a digital library for each of the districts, and use this information to create an informed survey instrument that will be deployed in advance of each agency interview, and will be used to solicit input on the services subject to this review under Health and Safety Code Section 13862. The survey instrument would be distributed to districts prior to interviews in order to collect preliminary information about each district.

Much of the information collected during the data collection phase for the alternative governance study will overlap and contribute to the municipal service review. RSG and Planwest aim to concentrate all data collection and inquiry into one interview with each agency. Our objective is to impact the normal daily operations of affected agencies as little as possible, but it is critical to collect information and interview each affected agency.

RSG and Planwest will conduct interviews with agencies to obtain input, assistance with relevant data collection and interpretation, and any additional context as required.

During the interviews, RSC and Planwest will review our data collection progress, and discuss any outstanding needs with each district. Combined with the data collection process, the interviews will provide insights into the existing conditions of facilities, apparatus, and equipment, near- and long-term growth and development potential within the district, existing adequacy of public facilities and services including ISO ratings, shared services including contract, automatic aid, and mutual aid services, the district's financial position and potential new or previously attempted voter-approved funding sources, operational and governance opportunities, and other challenges.

Timing and work products:

- Timing:
- Deliverables: District data profiles for internal use, survey instruments for distribution prior to district interviews

#### Task 2.1: Five-Year Financial Forecast

RSC would prepare a five-year financial forecast for each agency. Because the conceptual joint powers authorities include cities outside the scope of this service review, RSC would also prepare financial forecasts for fire and emergency medical services for each city and the County. The financial forecast would be prepared based on each agency's existing conditions, including existing revenue sources and historical trends associated with revenues and expenditures. If any agency has expiring special assessments, the financial forecast will assume that any voter-approved assessment will not be approved. The financial forecasts will be shared with LAFCO staff prior to distribution to the individual agencies for review. If there are any comments or feedback associated with the financial forecast, we will work with LAFCO staff to address those comments or adjust the forecast accordingly.

The five-year financial forecasts will be used to evaluate potential alternative governance models, and will also be included in the service review as detailed in Phase 3 in the proceeding section.

#### Task 2.2: Cost-Benefit Analysis

As we consider alternative governance options for the efficient provision of fire and emergency medical services, RSC will review existing service models employed by the South County Fire Authority and other similarly sized special districts and/or those that are relevant to the nature and size of the hypothetical fire authorities outlined in the RFP, or as identified by LAFCO staff, RSC, and Planwest. This includes reviewing each agency's existing governance model in relation to the comparable governance models to address potential enhancements to existing service delivery models.

We understand there are several different governance and service models currently employed in San Joaquin County and are as follows:

- Joint Powers Authority – South County Fire Authority
- Independent Districts – Clements Rural FPD, Colledgeville FPD, Escalon FPD, Farmington FPD, Lathrop Manteca FPD, Liberty FPD, Linden-Peters FPD, Mokelumne Rural County FPD, Montezuma FPD, Ripon FPD, Thorton FPD, Tracy Rural FPD, Waterloo Morada FPD, and Woodbridge FPD

- Independent Districts and Contract Service Providers – City of Stockton, French Camp-McKinley FPD
- Independent Districts Contracting for Fire and EMS Services – Boggs Tract FPD, Eastside FPD, Lincoln FPD, Tuxedo-Country Club FPD

Based on LAFCO request in the RFP, RSG and Planwest will begin by evaluating the potential use of Joint Powers Authorities in three other areas of San Joaquin County. RSG and Planwest have outlined the potential Joint Powers Authorities below, including some questions that may need to be addressed:

- North County Fire Authority – City of Lodi, Liberty FPD, Woodbridge FPD, Mokelumne FPD, Thornton FPD, and Clements FPD
- Central County Fire Authority – City of Stockton, Montezuma FPD, Waterloo Morada FPD, Colleagueville FPD, Farmington FPD, Linden-Peters FPD, and French-Camp McKinley FPD.
  - The City of Stockton provides contract services to Boggs Tract FPD, Eastside FPD, Lincoln FPD, and Tuxedo-Country Club FPD. We understand that LAFCO has already identified operational or governance deficiencies for some of these districts. For the purpose of this scope, RSG and Planwest assumed that these districts would be included in the Central County Fire Authority.
  - We also understand that French-Camp McKinley FPD provides fire and EMS services to the City of Mountain House. Mountain House is geographically separated from French-Camp McKinley FPD and the other agencies included in the Central County Fire Authority. Would Mountain House be included in the potential Central County Fire Authority?
- Southeast County Fire Authority – City of Manteca, Escalon FPD, Lathrop-Manteca FPD, and Ripon FPD

RSG and Planwest have prepared a map illustrating the potential Joint Powers Authorities, included as an attachment to this proposal.

RSG understands it is a priority to explore the applicability of using the South County Fire Authority governance model as a potential alternative for the rural fire and emergency medical service providers in the County. However, RSG will also consider the merits of other alternatives including potential consolidations, annexation, detachments, reorganizations, etc. These latter considerations will be reviewed on an as needed basis and may require amendments to the scope and budget should it be determined these paths may be more viable than pursuing a JPA model.

RSG and Planwest will prepare a matrix comparing the existing conditions and different governance alternatives. The matrix will compare potential cost savings and other benefits, as well as challenges that may be encountered. RSG and Planwest will develop preliminary findings and recommendations based on our understanding of the existing conditions and potential alternative service models.

### Task 2.3: Alternative Governance Study Preliminary Recommendations

RSG and Planwest would prepare a brief PowerPoint slide deck to share with LAFCO staff during a virtual meeting intended to discuss the preliminary recommendations. The preliminary recommendations would be based on RSG and Planwest's data collection, financial analysis, and interviews with affected districts.

### Task 2.4: Advisory Committee Meeting (or LAFCO staff meeting)

Upon completion and development of preliminary recommendations for the alternative governance study, RSG and Planwest would meet with the advisory committee to share initial findings and recommendations. This advisory committee meeting may be reconfigured, at LAFCO staff's direction, to include a smaller focused group. Alternatively, depending on the sensitivity of the alternative governance options, may be exclusively LAFCO staff, RSG and Planwest. RSG would draft a summary memorandum detailing information and action items identified during the advisory committee discussion.

### Task 3.1: Preparation of Alternative Governance Administrative Draft

RSG and Planwest will summarize preliminary recommendations in an administrative draft. The administrative draft will be designed to be read and understood by LAFCO staff, Commissioners, service providers, and the public with actionable recommendations and creative alternative governance options.

RSG and Planwest's preliminary findings would include a summary of the five-year financial forecast for each agency, a consolidated forecast for each potential alternative governance model, the cost-benefit analysis with potential operational efficiencies and redundancies, and potential new funding opportunities or financial strategies required to sustain operations and ensure services meet minimum standards. RSG and Planwest would provide a brief preliminary plan for implementation of any recommended alternative governance model. The document would include summary data tables, charts, graphs, and maps to support the findings, conclusions and recommendations.

### Task 3.2: Administrative Draft Alternative Governance Study

For the purposes of the schedule outlined herein, RSG has assumed that LAFCO staff would need up to one month to review the alternative governance study administrative draft. The administrative draft would be provided in DOCX format via a SharePoint folder/link. LAFCO staff would provide redline review and commentary in the DOCX file. Upon completion of the review, LAFCO staff, RSG, and Planwest would meet to discuss any comments or clarify any changes. With LAFCO staff's changes, RSG and Planwest would prepare a draft study. The draft study would be presented to LAFCO Commissioners and distributed to the Commission, County Board of Supervisors, affected/interested agencies, and the public.

### Task 3.3: Advisory Committee Meeting (or LAFCO staff meeting)

Upon completion and development of preliminary recommendations for the alternative governance study, RSG and Planwest would meet with the advisory committee to share initial findings and recommendations. This advisory committee meeting may be reconfigured, at LAFCO staff's direction, to include a smaller focused group. Alternatively, depending on the sensitivity of the alternative governance options, may be exclusively LAFCO staff, RSG and Planwest.

### Timing and work products:

- Timing:
- Deliverables:

### Task 4.1: Finalized Alternative Governance Study and Presentations:

Upon completion of our analysis of the above-referenced alternative governance model(s), RSG will prepare a final report presenting our methodology, assumptions, analysis, and conclusions.

The report will provide LAFCO and other decision makers with the information required to make the most informed decision regarding any governance and/or service delivery changes. This includes identifying the needed funding and financial strategies to support and/or improve fire protection and emergency medical service delivery to the community. The report will also include a preliminary plan for implementation associated with the alternative governance model RSG determines to be most feasible.

One electronic draft report will be shared with LAFCO staff for review and comment. RSG will coordinate with LAFCO staff where necessary to clarify any items needed to be discussed prior to finalizing the report and will be available to present the finalized report to LAFCO Commission as required. This would include providing LAFCO staff with the related presentation materials.

## **Phase 2: Streamlined Municipal Service Review**

### Task 5.1: Administrative Draft Service Review:

Building on RSG's data compilation and analysis in the preceding sections, and the anecdotal information collected during the interview stage, RSG would develop a streamlined agency profile for each of the 19 agencies that provide fire protection and emergency medical services, which represents the body of the MSR. The agency profile would include, at a minimum, the following:

- Agency data summaries, including population, demographic, and land use summaries, as well as staffing and governance summaries.
- Summary and discussion of services provided, including any out-of-agency services provided.

- General financial information, including historical revenues and expenditures, reserve fund balances and policies, and pension and other post-employment benefit obligations.
- Discussion about the agency's existing boundary, any recent changes, locations of disadvantaged unincorporated communities and islands/pockets, if any, and potential consolidation/reformation opportunities, and sphere of influence amendments.
- A discussion about recent and planned major capital improvements, including relevant findings identified in any engineering reports.
- The agency profile would also include MSR determinations and SOI recommendations designed to meet the requisite legal requirements under CKH.

RSG and Planwest will prepare an administrative draft service review report for LAFCO staff. The report will address the determinations required by CKH Sections 56425 and 56430, and any additional factors/criteria established by LAFCO policy. The report will be sent electronically to LAFCO staff for review prior to an virtual meeting to discuss staff's comments and edits. RSG and Planwest will incorporate comments, edits, and corrections based on staff comments.

During the Administrative Draft review period, we recommend that the agency staff receive a modified version of the Administrative Draft service review for review and comment. The modified version provided to district staff would exclusively include information about their district and exclude information about other districts. Distributing the Administrative Draft MSR to the districts provides an opportunity to receive feedback and corrections early on in the MSR process. Occasionally, sensitive information may require LAFCO's review prior to district stakeholder review. RSG and Planwest will consult with LAFCO staff to determine if this is appropriate. Electronic copies of the administrative draft service review will be distributed to LAFCO staff and district stakeholders.

#### Task 5.2: Final Service Review and Commission Meetings

RSG will distribute the public review draft service review to the agency for review and comment. RSG will work with LAFCO staff to determine an appropriate review period. RSG will parse public review draft MSR comments and work with LAFCO staff, where appropriate, to obtain input in addressing the public review draft MSR comments.

The revised public review draft MSR, reflecting any changes received during the public review period, would then be known as the public hearing draft service review. RSG anticipates that the public hearing draft MSR will be posted for public review ahead of the Commission public hearing. RSG would work with LAFCO staff to review and address any comments received prior to the Commission public hearing.

RSG would coordinate with LAFCO staff to prepare a public hearing slide deck, to be provided to LAFCO staff prior to the Commission public hearing (PPT and PDF format shared via OneDrive). RSG and LAFCO staff would also work together to coordinate speaking roles and assignments during the public hearing.

RSG will review and compile any comments and revisions received prior to and during the public hearing, and any final comments or corrections by LAFCO staff or the Commission. The revised public hearing draft MSR would then be known as the Final Draft MSR. RSG will provide an electronic PDF copy via OneDrive of the Final Draft MSR to LAFCO staff.

RSG would attend a second public hearing for final draft service review approval, as needed.

**TENTATIVE SCHEDULE**

Attachment 1 presents a tentative schedule for completion of all phases of the park and recreation study. The schedule remains “tentative” given the potential increase in the time to conduct relevant analysis. Dates may also be subject change.

<b>Timeline</b>	<b>Task</b>
January, 2024	Task 1.1 - Kickoff and background research
February, 2024	Task 1.2 - Advisory committee workshop
January - April, 2024	Task 1.3 - Data collection, survey instrument, and interviews
March - April, 2024	Task 2.1 - Five-year financial forecast (19 Districts)
May, 2024	Task 2.2 - Cost-benefit analysis
June, 2024	Task 2.3 - Alternative governance study initial recommendations
June or July, 2024	Task 2.4 - Advisory committee workshop
July - August, 2024	Task 3.1 - Draft alternative governance study agency profiles
August, 2024	Task 3.2 - Admin draft alternative governance study
September, 2024	Task 3.3 - Revisions to admin draft alternative governance study
October, 2024	Task 4.1 - Final alternative governance study, two public meetings
February, 2025	Task 5.1 - Draft and distribute admin and public review draft service review
March - April, 2025	Task 5.2 - Attend Commission meetings for final approval, prep final service review

**WORK EXPERIENCES AND REFERENCES**

**RSG REFERENCES**

The projects below demonstrate RSG’s recent experience comparable to the services requested in this RFP. We encourage you to contact our references or follow up with additional questions.

**Sutter County Countywide Fire and Emergency Medical Services Municipal Service Review and Sphere of Influence Update – Sutter LAFCO**

In July 2024, RSG began working with Sutter County LAFCO to prepare a Countywide Fire and EMS MSR and SOI Update. The MSR will include review of five agencies, including two fire protection districts, two cities, and Sutter County Fire, which provides fire protection and emergency medical services to four County Service Areas. RSG review will also include coordination with Bi-County Ambulance, a pre-hospital medical care service provider that is outside the purview of LAFCO. We expect to complete the MSR and SOI Update by mid-2025.

**CONTACT:** Doug Libby, Executive Officer  
 Local Agency Formation Commission for the County of Sutter  
 dlibby@yubacity.net  
 530.822.3231



Siskiyou County Countywide Fire Service Municipal Service Review & Sphere of Influence Update – Siskiyou LAFCO

RSG were retained by the Local Agency Formation Commission for the County of Siskiyou in 2022 to perform a Municipal Service Review and Sphere of Influence update for the 31 fire protection agencies in Siskiyou County. RSG are currently finalizing the Public Review Draft MSR. The MSR will recommend several areas in the County where LAFCO should consider coordinating with fire protection agencies to amend spheres of influence and district boundaries.

CONTACT: Rachel Jereb, Deputy Executive Officer  
Local Agency Formation Commission for the County of Siskiyou  
rjereb@co.siskiyou.ca.us  
530.842.8205

Municipal Service Review & Sphere of Influence Update of the Consolidated Fire Protection District of the County of Los Angeles – Los Angeles LAFCO

RSG was retained by the Local Agency Formation Commission for the County of Los Angeles in 2019 to perform a Municipal Service Review and Sphere of Influence update for the Consolidated Fire Protection District of the County of Los Angeles and their identified affected agencies. RSG reviewed each agency's sphere of influence area in accordance with California Government Code Sections 56425 and 56430 and LAFCO's local guidelines. The MSR was designed to meet the requirements of the law for LAFCO to conduct periodic MSRs and SOI updates, specifically with respect to the urban and rural fire protection services provided by CFPD to existing local agencies and five possible fee-for-service agencies (La Verne, Manhattan Beach, Redondo Beach, San Gabriel, and Vernon).

CONTACT: Paul Novak, Executive Officer  
Local Agency Formation Commission for the County of Los Angeles  
pnovak@lalafco.org  
626.204.6500

**PLANWEST REFERENCES**

Rio Dell Fire Protection District Annexation/Consolidation – Humboldt County

Planwest assisted with technical assistance and coordination efforts between four different agencies which culminated in a consolidation proposal through the strategic use of annexation. The annexation provided for the consolidation of fire protection service operations and administration while also retaining the important local identity of each community's fire department. Response capabilities have been improved by establishing a command structure through the appointment of battalion chiefs and a regular duty officer program. To ensure efficiency, pager tones have been modified to provide a focused response, calling on firefighters only from within a single battalion for typical medical calls that require limited resources, and using an all-call dispatch for incidents requiring additional resources. This system has resulted in additional resources and capacity to respond to more remote areas that can be promptly cancelled by the duty officer if they turn out not to be needed. This new structure has energized the volunteer firefighters and has increased participation at meetings, trainings, and incidents.

CONTACT: Shane Wilson, Fire Chief  
Rio Dell Fire Protection District  
shanewilson@riodellfire.com  
707-496-7215

Beckwourth Peak Fire Protection District Formation and Special Tax – Eastern Plumas County

Planwest partnered with RSG Inc. in the development of a feasibility study and plan for services for a new fire protection district in eastern Plumas County. In late 2017, the City of Portola was alerted to deficiencies in its volunteer fire department which ultimately resulted in stand down orders, a contract for services with Beckwourth Fire Protection District, and a larger scale planning effort to evaluate the level of fire services in the eastern portion of the county. As part of the feasibility study, the Planwest team coordinated with fire and emergency service providers in the region to establish a regional fire district in response to the rising costs of equipment, liability insurance, increased wildfire severity, decline of volunteers, and the pressures of scattered residential development in disperse areas. This resulted in an application to Plumas LAFCo for a new regional fire protection district and special tax funding measure that was approved by voters in November 2023. The new Beckwourth Peak FPD consolidated fire service responsibility and functions provided by Beckwourth Fire Protection District, Sierra Valley Fire Protection District, City of Portola, and Gold Mountain Community Services District. Planwest continues to assist Beckwourth Peak Fire with planning and technical assistance to pursue annexation of the Eastern Plumas Rural Fire Protection District, who has ceased providing all fire and emergency medical services and has since relied on Beckwourth Peak to provide uncompensated services within the EPRFPD service boundaries. In January 2024, EPRFPD requested through Plumas LAFCo to be annexed into BFPD.

CONTACT: Cary Curtis  
Beckwourth Peak Fire Protection District  
cary.curtis77@gmail.com  
916-747-6584

North Coast Resource Partnership – Technical Assistance Provider

Planwest currently has an open scope contract for providing technical support to project sponsors on behalf of the North Coast Resource Partnership. Past technical support efforts include providing proposal support to water and wastewater providers as part of the NCRP Proposition 1 IRWM Rounds 1 & 2 and the NCRP Urban and Multibenefit Drought Relief (Round 1) and Drought Set Aside (Round 2). Planwest was also involved in conducting a series of interviews with fire service providers and tribal communities to develop a regional assessment of wildfire resilience capacity in the North Coast region. We are currently providing project specific technical assistance to Kneeland FPD in Humboldt County and Weaverville FPD in Trinity County to help create sustainable base funding to support continued fire protection and emergency response services for both agencies.

CONTACT: Cybelle Immitt  
Humboldt County Department of Public Works  
cimmitt@co.humboldt.ca.us  
707-267-9542

**COST & OTHER INFORMATION**

RSG and Planwest are estimating a total budget not to exceed \$190,245 inclusive of the hours and expenses pursuant to our Billing Rate and Fee Schedule. The assignment would be billed on a time and materials basis, so actual cost may be less than the not-to-exceed budget. Additional services outside the scope of work may require a contract amendment.

**RSG BILLING RATES & FEE SCHEDULE**

RSG's Billing Rates are as follows:

Principal	\$ 295
Director	\$ 275
Senior Associate	\$ 225
Associate	\$ 195
Senior Analyst	\$ 160
Analyst	\$ 145
Research Assistant	\$ 135
Technician	\$ 100
Clerical	\$ 60
Reimbursable Expenses	Cost plus 10%

**RSG does not charge clients for travel or mileage** (except direct costs related to field work/surveys), parking, standard telephone/fax expenses, general postage, or incidental copies. However, we do charge for messenger services and overnight shipping/express mail costs. We also charge for copies of reports, documents, notices, and support material more than five (5) copies. We bill reimbursable costs at the actual expense plus a 10% surcharge.

RSG issues monthly invoices payable upon receipt, unless otherwise agreed upon in advance. Invoices identify tasks completed to date, hours expended and the hourly rate.

Scope of Services Fire / EIAS MSR and SOI Update Pacer LAFGO (September 2024)		Task Hours & Billing Rate				Total Hrs	Reimb Planwest	Total Not to Exceed
		Principal \$ 295	Sr. Assoc \$ 225	Associate \$ 195	Sr. Analyst \$ 160			
<b>Phase 1</b>	<b>Project Initiation, Data Collection, Interviews</b>	3	46	70	140	259	\$ 12,488	\$ 99,700
Task 1.1	Kickoff and background research	2.00	7.50	12.50	9.50	31.50	1,283	7,518
Task 1.2	Advisory committee workshop	-	5.00	7.00	4.00	16.00	1,310	4,440
Task 1.3	Data collection, survey instrument, and interviews	1.00	30.00	50.50	125.75	211.25	9,895	47,743
	<b>Analysis</b>	3.00	142.00	140.00	57.00	11,447.00	\$ 11,245	\$ 99,710
Task 2.1	Five-year financial forecast (19 Districts)	-	26.00	28.00	1.00	55.00	-	11,680
Task 2.2	Cost-benefit analysis	-	15.00	23.00	25.00	63.00	5,135	17,955
Task 2.3	Alternative governance study initial recommendations	2.00	11.00	23.00	23.00	59.00	4,515	15,745
Task 2.4	Advisory committee workshop	1.00	6.00	8.00	7.00	22.00	1,595	5,820
	<b>Administrative Draft Alternative Governance Study</b>	1.00	21.00	37.50	50.00	109.50	\$ 9,398	\$ 30,730
Task 3.1	Draft alternative governance study agency profiles	-	2.00	14.00	25.00	42.00	4,845	12,185
Task 3.2	Admin draft alternative governance study	-	14.00	12.50	13.00	39.50	3,473	11,140
Task 3.3	Revisions to admin draft alternative governance study	1.00	5.00	11.00	11.00	28.00	1,090	6,405
	<b>Public Review Draft and Final Alternative Governance Study</b>	1.00	30.00	44.50	27.50	103.00	\$ 8,748	\$ 29,870
Task 4.1	Final alternative governance study, two public meetings	1.00	30.00	44.50	27.50	103.00	9,748	29,870
<b>Phase 2</b>	<b>Final Draft Alternative Governance Study and Service Review</b>	1.00	28.00	40.00	28.00	97.00	1,360	\$ 30,235
Task 5.1	Draft and distribute admin and public review draft service review	-	5.00	12.00	24.00	41.00	660	7,895
Task 5.2	Attend Commission meetings for final approval, prep final service review	1.00	23.00	28.00	4.00	56.00	690	12,250
<b>GRAND TOTAL BUDGET</b>		9.00	206.50	382.00	202.75	10,816.25	\$ 44,238	\$ 190,245

PLANWEST BILLING RATES

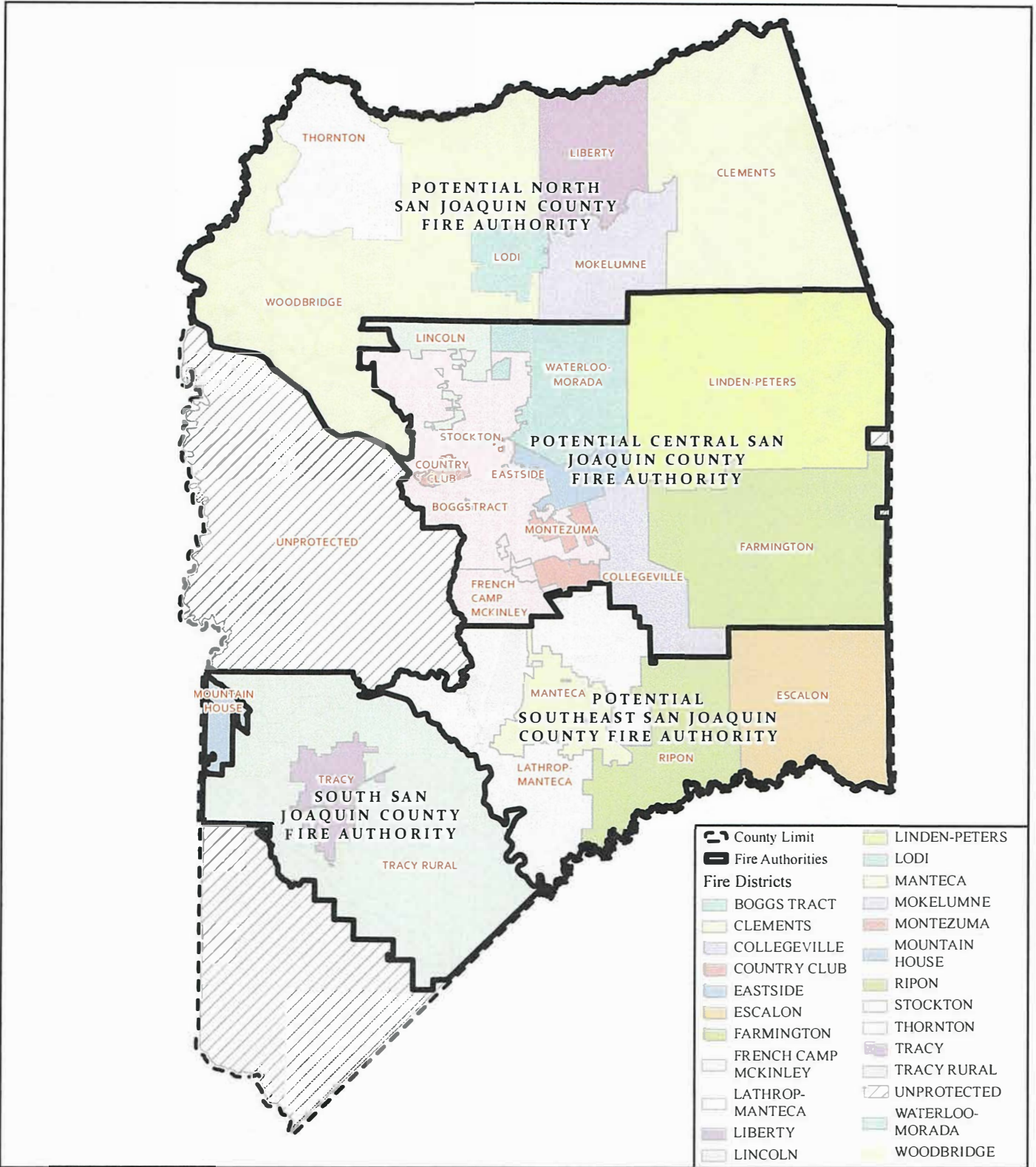
Planwest's Billing Rates are as follows:

Principal / Partner	\$ 170
Senior Advisor	\$160
Senior Planner	\$145
GIS Analyst	\$ 115
Fire Services Specialist	\$ 115
Assistant Planner	\$ 115

## **WORK SAMPLES**

Due to their size and length, we have elected to provide hyperlinks to three recent LAFCO work products we have prepared below:

1. [Consolidated Fire Protection District of the County of Los Angeles \(LA LAFCO\)](#)
2. [Beckwourth Fire Protection District Formation Feasibility Study \(City of Portola\)](#)
3. [West Region Municipal Service Review and SOI Update \(OC LAFCO\)](#)

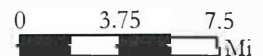


## San Joaquin Fire Districts and Potential Fire Authorities

Sources: Fire Districts, County Limit: San Joaquin County Open GIS

11/15/2024

Coordinate System: NAD 1983 StatePlane California III FIPS 0403 Feet



# Attachment 3



## Proposal for Professional Services to Prepare Alternative Governance and Service Review for the Fire and Emergency Services in Rural San Joaquin County



December 10, 2024

Submitted to:

San Joaquin Local Agency Formation Commission  
Attn: J.D. Hightower, Executive Officer  
44 North San Joaquin Street, Suite 374  
Stockton, CA 95202

Submitted by:

**De Novo Planning Group**

A Land Use Planning, Design, and Environmental Firm

1020 Suncast Lane, Suite 106 | El Dorado Hills, CA 95762  
info@denovoplanning.com | TEL 916-580-9818



# De Novo Planning Group

A Land Use Planning, Design, and Environmental Firm



# De Novo Planning Group



A Land Use Planning, Design, and Environmental Firm

December 9, 2024

San Joaquin Local Agency Formation Commission  
Attn: J.D. Hightower, Executive Officer  
44 North San Joaquin Street, Suite 374  
Stockton, CA 95202

SUBJECT: Proposal to Prepare Alternative Governance and Service Review for the Fire and Emergency Services in Rural San Joaquin County

Dear Mr. Hightower:

On behalf of De Novo Planning Group, thank you for the opportunity to submit this proposal to provide consulting services for the above referenced project. Based on our review of the RFP, we are confident that our experience, record of success, and Principal-level attention to the Project will prove to be extremely valuable to LAFCo. The enclosed proposal includes all the information requested in the RFP, including the qualifications of our team, a detailed scope of work for the requested Project deliverables, schedule, and competitive budget.

We have assembled a carefully-selected team of experienced land use planners, financial/economic planners, and a retired Fire Chief with 42 years working for Ripon Consolidated Fire District. Collectively, our team is 100% committed to this Project and will allocate our resources and energy in a way that will exceed all expectations.

De Novo Planning Group would serve as the prime consultant for this contract with LAFCo. Our team is led by Principal Planner Steve McMurtry. Mr. McMurtry will serve as the Project Director and primary point of contact for all project matters. Berkson Associates, led by Richard Berkson, would serve as the financial/economic consultant. Dennis Bitters is a retired Fire Chief for the Ripon Consolidated Fire District. Having 42 years of fire service in San Joaquin County, Mr. Bitters will bring his vast experience, qualifications, and relationships to the team in an advisory role.

The first part of the study is a streamlined service review/analysis of each service provider with a five-year financial forecast analysis, and a written statement of determinations as required by the CKH Act including governance options. The second part is the Alternative Governance Study that will include an evaluation of a preferred alternative model for service delivery, which may be a consolidation of the 19 districts into three or more regional districts to create operational and financial efficiencies.

We truly appreciate being considered for this project. We are confident that our experience, record of success, and Principal-level attention to every project will prove to be extremely valuable to LAFCo. We look forward to the opportunity to further discuss our proposal and approach to the preparation of the document. If you have any questions regarding this submittal, please contact me at 916-580-9818.

Sincerely,

DE NOVO PLANNING GROUP  
Steve McMurtry  
Principal



## IDENTIFICATION OF RESPONDER

**Submitter:** De Novo Planning Group, Inc.

**Legal Entity:** California Corporation

**Address:** 1020 Suncastr Lane, Suite 106, El Dorado Hills, CA 95762.

**Principal Contact:** Steve McMurtry, Principal, (916) 580-9818.

## QUALIFICATIONS

### DE NOVO PLANNING GROUP

De Novo Planning Group is a land use and environmental planning firm specializing in community planning, environmental studies, design, and development services. Since 2008, De Novo Planning Group has successfully operated in the Sacramento, Greater Bay Area, Central Valley, Tahoe Basin, and northern California regions, and in 2017, opened an office in Orange County to serve southern California clients. The firm's principal-level staff have successfully completed over 1,000 projects consisting of environmental impact reports, negative declarations, initial studies, NEPA analyses, climate action plans, biological assessments, wetland delineations, general plans, specific plans, housing elements, and development projects throughout California. De Novo Planning Group has full-service offices in northern and southern California.

### OUR MISSION

Our mission is to provide municipal and private sector clients with world-class professional services, through principal-level attention to every project. We pride ourselves on our ability to work with clients to balance the often-conflicting goals of economic, social, environmental, legal, and political forces. Our services result in an integrated planning and environmental solution for every project that is technically sound, cost effective, and delivered within the client's schedule.

### OUR PHILOSOPHY

Our philosophy is to proactively plan and design projects in such a way that public and environmental concerns are addressed and accommodated early in the process. We strongly believe in the use of our knowledge for developing sensible and cost-effective solutions to concerns. Our solutions integrate local knowledge with the best available resources to achieve recognized national and international standards for planning and environmental management, to achieve a balance in local economic, social, and environmental goals. De Novo Planning Group is dedicated to fostering a partnership with each agency we serve, through listening to the community and stakeholders and reflecting the ideas and concerns we hear in the approach developed for each project.

De Novo Planning Group is not involved in any pending litigation which may affect our ability to provide services to the City as stated in this proposal.



## SUBCONSULTANT TEAM

The Project Team includes Berkson Associates who specializes in fiscal, financial, and economic evaluation to improve California city and special district plans, programs and land use policy. Tools include budget planning, financial benchmarking, cost management, economic development and revenue generating strategies. Forecasting scenarios provide a foundation for strategic management to improve service delivery and organization. The point of contact for Berkson will be Richard Berkson, Principal. Mr. Berkson was a founding partner of Economic and Planning Systems (EPS) and principal of EPS for over 32 years before forming Berkson Associates. He is an associate member of CALAFCO and has been active in the organization for years. Mr. Berkson has extensive experience working on a range of fire service analyses such as the financial determinations of municipal service reviews, analyzing organizational alternatives, and evaluating cost and revenue allocations among fire service providers as part of a JPA or other agreement. Mr. Berkson's experience also includes district reorganizations (including fire districts), city incorporations and annexations including tax exchange agreements, municipal budget analysis, fiscal indicators, and forecasting.

The Project Team also includes Dennis Bitters who worked for the Ripon Consolidated Fire District for 42 years (1982-2004). During his tenure in the fire service, he served as a Fire Chief, Assistant Fire Chief, Deputy Fire Marshal, Battalion Chief, Captain, Lieutenant, and Firefighter. Dennis maintains an extensive list of certifications and memberships with professional organizations in the fire service. Dennis will provide valuable advisory services for the project team based on his local experience and expertise, as well as with his relationships with the fire districts in San Joaquin County.

## EXPERTISE WITH LAFCO

The Project Director, Steve McMurtry, has 25 years of experience as a land use and environmental planner, which includes a complex array of governmental organizations, planning documents, budgets, and regulations. Mr. McMurtry has significant experience working for San Joaquin County LAFCo, preparing Municipal Service Reviews, Sphere of Influence Amendments, Plans for Services/Annexation Plans, and Detachments. Mr. McMurtry also assisted San Joaquin County LAFCo on the recent incorporation of Mountain House. Mr. McMurtry had a long-standing working relationship with retired Executive Director Jim Glaser during his tenure in San Joaquin County. Mr. McMurtry has also had a long-standing working relationship with current Executive Director JD Hightower during his past tenure in Riverbank and Manteca, and recently with San Joaquin County LAFCo. Mr. McMurtry's understanding of LAFCo functions will prove to be an asset to LAFCo and the Project Team.

Mr. Berkson also has extensive experience working of LAFCo projects, including financial determinations of municipal service reviews, analyzing organizational alternatives, and evaluating cost and revenue allocations among fire service providers as part of a JPA or other agreements. Mr. Berkson's experience also includes district reorganizations (including fire districts), city incorporations and annexations including tax exchange agreements, municipal budget analysis, fiscal indicators, and forecasting.

## EXPERTISE IN FIRE AND EMERGENCY SERVICES

The team includes two principal team members with Fire and Emergency services experience. First, Dennis Bitters will serve as the Project Advisor. Mr. Bitters worked for the Ripon Consolidated Fire District for 42 years (1982-2004). During his tenure in the fire service, he served as a Fire Chief, Assistant Fire Chief, Deputy Fire Marshal, Battalion Chief, Captain, Lieutenant, and Firefighter. Dennis will provide valuable advisory services for the project team based



on his local experience and expertise, as well as with his relationships with the fire districts in San Joaquin County. His experience and expertise covers every facet of the fire and emergency service operational model including: 1) a management level understanding of how fire and emergency services are financed and delivered, 2) expertise with national fire and emergency medical services standards such as NFPA 1710, NFPA 1720, Center for Public Safety Excellence 6th Edition Community Risk Assessment: Standards of Cover, and other national standards, 3) experience with the operations of fire department, including recruitment, retention and training of firefighters at various levels of medical service education (first responder, basic life support, paramedic, etc.).

In addition to the vast fire experience and qualifications provided by our Team Project Advisor, the Project Director, Steve McMurtry, prior to becoming a professional planner obtained an Associates of Science Degree in Fire Technology, an EMT certification, and served as a Fire Fighter and EMT for the US Forest Service (Angeles National and El Dorado National Forest). Mr. McMurtry's studies covered many aspects of the fire and emergency service delivery models in urban and wildland interface.

## CONFLICT OF INTEREST

The Project Team has no conflicts of interest.

## INSURANCE REQUIREMENTS

The firm has the required insurance policies in force in acceptable amounts of coverage for Professional Liability, Workers Compensation, Comprehensive General Liability and Auto (Owned and Non-Owned). Prior to any commencement of services, the firm will provide certificates of insurance coverage to LAFCO.



## KEY PERSONNEL

### STEVE MCMURTRY – PROJECT MANAGER/PRINCIPAL PLANNER



Steve has successfully led multidisciplinary teams to complete hundreds of environmental, transportation and land use planning, and development projects throughout California. Steve's experience includes service in engineering and planning firms, as well as in the home-building industry. His environmental experience encompasses field research, public outreach, mitigation development, document writing, and permitting. During his tenure in the construction industry, he was responsible for planning, design, and construction of projects valued over \$300 million for a Fortune 500 company, which included the construction of roadways, utilities, pump stations, parks, and trails. Steve graduated from Cal Poly San Luis Obispo with a bachelor's degree in Natural Resource Management with graduate studies in Biological Sciences at San Jose State University.

### CHRISTINA ERWIN –PRINCIPAL PLANNER

Christina is a principal planner with more than 22 years of experience in planning for public- and private-sector clients throughout the California Central Valley. She has successfully managed many planning projects involving urban infill, housing, new land development, major sports and entertainment venues, general plans, and large-scale specific plans. Christina's specialty is working on technically and politically complex, multifaceted projects that require a high degree of coordination and interface with multiple stakeholders. She develops and guides the strategic application of projects, with a focus on streamlining review, providing rigorous analysis, and helping clients achieve their project objectives. Christina holds a bachelor's of science degree from University of California, Davis in Environmental Policy Analysis and Planning.



### ELISE CARROLL – SENIOR PLANNER



Elise specializes in environmental impact reports and urban planning for both the public and private sectors. As an experienced environmental impact assessment practitioner (CEQA and NEPA), Elise analyzes and summarizes the environmental impacts of existing and proposed developments. On behalf of De Novo Planning Group, she regularly provides informative research summaries and mitigation recommendations to public and private agencies. Elise holds a bachelor's of science degree from University of California, Davis in Environmental Policy Analysis and Planning (with an emphasis in Urban & Regional Planning).

### JOSH SMITH – SENIOR PLANNER

Josh has 13 years of experience including preparation of CEQA documents, climate change planning, development of air quality and greenhouse gas studies, and Health Risk Assessments. Josh developed greenhouse gas inventories and context-specific GHG mitigation measures, as well as custom air emissions calculators for complex projects. He also has prior experience working in state and local government. Josh graduated from UC Davis with a BS in Environmental Policy Analysis & Planning, where he participated in the Davis Honors Challenge Program. He is a LEED AP O+M professional.





## BERKSON ASSOCIATES

Berkson Associates specializes in fiscal, financial, and economic evaluation to improve California city and special district plans, programs and land use policy. Tools include budget planning, financial benchmarking, cost management, economic development and revenue generating strategies. Forecasting scenarios provide a foundation for strategic management to improve service delivery and organization.

### RICHARD BERKSON, PRINCIPAL – BERKSON ASSOCIATES

Richard Berkson, Principal of Berkson Associates, was a founding partner of Economic and Planning Systems (EPS) and principal of EPS for over 32 years before forming Berkson Associates. He graduated from the Goldman School at UC Berkeley with a Master's Degree in Public Policy after studying at MIT and UC Berkeley as an undergraduate. He is an associate member of CALAFCO and has been active in the organization for several years. Mr. Berkson has extensive experience working on a range of fire service analyses such as the financial determinations of municipal service reviews, analyzing organizational alternatives, and evaluating cost and revenue allocations among fire service providers as part of a JPA or other agreement. Mr. Berkson's experience also includes district reorganizations (including fire districts), city incorporations and annexations including tax exchange agreements, municipal budget analysis, fiscal indicators, and forecasting.

## DENNIS BITTERS

### DENNIS BITTERS, PROJECT ADVISOR - RETIRE RIPON CONSOLIDATED FIRE DISTRICT CHIEF

Dennis Bitters worked for the Ripon Consolidated Fire District for 42 years (1982-2004). During his tenure in the fire service, he served as a Fire Chief, Assistant Fire Chief, Deputy Fire Marshal, Battalion Chief, Captain, Lieutenant, and Firefighter. Dennis maintains an extensive list of certifications and memberships with professional organizations in the fire service. Dennis will provide valuable advisory services for the project team based on his local experience and expertise, as well as with his relationships with the fire districts in San Joaquin County.



## MISCELLANEOUS PROJECTS

The following is a sample projects that involved a LAFCo approval as a component of the project. The LAFCo review involved for these projects involved SOI amendments, annexations, detachments, etc.

### CITY OF MANTECA GRIFFIN PARK MASTER PLAN



De Novo Planning Group prepared an EIR, Annexation Plan, SOI Amendment, and MSR Amendment for the Griffin Park Master Plan project in Manteca. The project was primarily a single-family residential development anticipated to provide 1,592 units. Additionally, the Project includes five acres of neighborhood service commercial anticipated to provide approximately 65,340 square feet of commercial. The Project would provide approximately 26.46 acres of parks and open space.

The proposed Project includes design standards and guidelines and would provide various housing and lot sizes. The proposed Griffin Park Design Guidelines shall apply to all residential and non-residential projects that are subject to Site Plan Approval.

**Reference:** JD Hightower, Previous Planning Director, City of Manteca

### CITY OF LATHROP, SOUTH LATHROP SPECIFIC PLAN



De Novo completed the EIR for the South Lathrop Specific Plan (SLSP). Steve McMurtry led the team, and was supported by technical staff. Encompassing 315 acres, the SLSP provides infrastructure and services to adequately and responsibly support development. Land use designations within the Plan Area include commercial office (10 acres), limited industrial (222 acres), open space (31.5 acres), and related public facilities (51.5 acres). The project anticipates development of 4M square feet of employment-generating uses. Steve McMurtry served as the project manager for the project. The project

was completed in 2013 and is currently under construction.

**Reference:** Rebecca Schmidt, AICP, Previous Community Development Director, City of Lathrop

### CITY OF BRENTWOOD, PRIORITY AREA 1 (PA-1) SPECIFIC PLAN



De Novo is preparing a Specific Plan and Environmental Impact Report for the Priority Area 1 (PA-1). Ben Ritchie is leading the Specific Plan project team, and Steve McMurtry is leading the EIR team. PA-1 is a 373-acre project site located in the northwest corner of Brentwood, and is a projected focal point for jobs and mixed-use development. The Specific Plan will create the precise criteria for the growth and development of PA-1 by establishing a vision for the area, identifying uses desired and allowed in PA-1, and planning for infrastructure improvements to support future development.

**Reference:** Tim Nielson, Associate Planner, City of Brentwood  
(925) 516-5151 | [tnielson@brentwoodca.gov](mailto:tnielson@brentwoodca.gov)



## PROJECT UNDERSTANDING

The San Joaquin Local Agency Formation Commission (LAFCO) seeks proposals from qualified consulting firms to prepare an alternative governance and service review study evaluating nineteen rural agencies that provide fire protection services in San Joaquin County. This report will not address the San Joaquin Emergency Medical Services (EMS) except to establish the relationship with the fire districts and to evaluate the adequacy of services by the fire districts to both fire and medical emergency calls. This report will not evaluate EMS service in San Joaquin County.

There are nineteen (19) rural independent special districts in the County:

- Boggs Tract Fire Protection District
- Clements Rural Fire Protection District
- Colledgeville Fire Protection District
- Eastside Fire Protection District
- Escalon Fire Protection District
- Farmington Fire Protection District
- French Camp-McKinley Fire Protection District
- Lathrop-Manteca Fire Protection District
- Liberty Fire Protection District
- Lincoln Fire Protection District
- Linden-Peters Fire Protection District
- Mokelumne Rural County Fire Protection District
- Montezuma Fire Protection District
- Ripon Fire Protection District
- Thornton Fire Protection District
- Tracy Rural Fire Protection District
- Tuxedo-Country Club Fire Protection District
- Waterloo-Morada Fire Protection District
- Woodbridge Fire Protection District

The study will concentrate on fire protection and emergency medical services for the unincorporated areas of San Joaquin County. The study will be divided into two parts:

The first part of the study is a streamlined service review/analysis of each service provider with a five-year financial forecast analysis, and a written statement of determinations as required by the CKH Act including governance options. The second part is the Alternative Governance Study that will include an evaluation a preferred alternative model for service delivery, which may be a consolidation of the 19 districts into three or more regional districts.





## SCOPE OF WORK

### TASK 1 PROJECT INITIATION

Within one week of project commencement, the De Novo team will have a conference call with LAFCo Staff to discuss the following:

- Collection of relevant background documents (adopted documents, reports, and studies),
- Refinement of project work scope if necessary,
- LAFCo preferences for point of contact, method of communication, meeting responsibilities, project updates, etc.,
- Project deliverables.

The RFP identifies “Important Considerations” as follows:

- The consultant must be well versed in local government finance in California to study the issue and provide viable, actionable recommendations regarding governmental changes, including annexations and consolidations.
- Several communities in the study area consist of small-lot subdivisions on private wells. Some developments are in rural, isolated areas with irrigated farmland, dairies, and pasture. The consultant must be mindful of these characteristics when evaluating service.
- A portion of the County is currently without fire services. The proposed alternative governance options should include the extension of services into these areas through either amending the boundaries/spheres of influence of neighboring districts or establishing a fire district for the entire area.

We will rely on LAFCo to provide information and details relative to these important considerations. We have not scoped and budgeted the time needed to investigate and research each of these topics at a parcel level throughout the County. If LAFCo cannot provide this information we may require additional scope to do the research necessary, or it is anticipated that analysis will be done on a much broader level within the districts.

### TASK 2 SERVICE EVALUATION AND ANALYSIS.

**Service Analysis:** We will conduct a streamlined service review of fire protection services for each of the 19 fire protection districts. For each agency, we will assess the level of current services, including response times, infrastructure, service coverage areas, equipment, and personnel. We will analyze operational structures, governance frameworks, policies, and staffing levels of each agency. This analysis will largely be structured like the existing MSR for the Fire Protection Districts. The format and content of the existing MSR will provide a baseline that will be augmented and updated as appropriate. The update will include the status and outcome (if any) of the existing MSR’s recommended implementation strategy.

**Financial Analysis:** Berkson will perform a financial analysis of past, current and projected fiscal health issues and opportunities provides the basis for the updated MSR determinations. The analysis of each agency will be consolidated and revised to reflect governance alternatives considered, including funding opportunities, operational efficiencies, and eliminated redundancies. Recommendations will be distilled into concise implementation actions.

**Data Review and Summary:** Berkson will research and review relevant background documents and request additional documents not otherwise readily available.

Documents and data include financial reports, budgets and forecasts, CIPs, impact fee information, staff positions and average employment costs (salaries, taxes, benefits, etc.), pension obligations, anticipated changes in services, facilities, costs, revenues; special studies.



We will utilize online and readily available sources to the extent possible to minimize the burden on agency staff. Research will focus on information needed to inform the governance alternatives.

**Fiscal Conditions and Trends -- Key Fiscal Indicators:** Fiscal indicators can provide a signal of trends in fiscal health. Three key indicators utilized include changes over time in revenues and expenditures compared to benchmarks. Operating reserves are a third fiscal indicator. Other indicators will be utilized as appropriate, particularly during the evaluation of governance alternatives.

Key fiscal indicators will be organized by groups of similar indicators, e.g., revenues (property tax amounts and rates), positions and salaries, expenditures, debt and other costs and obligations (such as pensions). Berkson Associates will utilize data sources such as the County Auditor and/or the State Controller's office, particularly if agency reports are not readily available or are unavailable. More detailed agency information, for example as may be required for the analysis of governance alternatives, may dictate further research and requests to agencies.

This section and other sections of the report will summarize additional indicators such as staffing, equipment, and facilities. The agencies will be summarized and grouped by potential JPAs to assist with comparisons of agencies focusing on potential JPA organizations. The JPA groupings will help to understand the fiscal implications of consolidating certain functions and agencies.

Capital Improvement Programs, facility and equipment needs, costs and funding will be documented during the data gathering and review process. The study will not provide an independent assessment of conditions or needs but will identify if such information appears lacking.

**5-Year Budget Forecasts:** Current budget and forecasts based on past trends and anticipated changes will be summarized for each district. Agency staff will review and refine projections. As an optional task (not shown) the budget spreadsheets can be provided to each agency for ongoing use. The summary budgets will be combined and modified to estimate each JPA budget.

**Financial Ability of Agencies to Provide Services:** The 2011 MSR will be updated for current information and basis for required determinations. Significant changes since 2011 will be noted. This section will include any identified opportunities for cost savings and revenue enhancements and note significant financial trends and risks that should be addressed through operational and/or organizational changes and funding augmentation. Financial planning, including capital improvement programs and funding (e.g., development fees), will be reviewed for potential shortfalls and possible improvements.

**Determinations:** The analysis will include a written statement of determinations with respect to each of the following:

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. This determination will include a summary of governance options.
7. The potential effect of agency services on agricultural and open space lands.

**Limitations and Considerations to Analysis:** We intend to utilize the existing MSR recently prepared for the fire districts as a base source of information that can then be updated and supplemented to new and more current information. We intend to setup a meeting with each of the 19 fire districts to discuss the project and to request information that will be needed for the Service and Financial Analysis. We cannot guarantee cooperation and timely responses from all or any of the fire districts. We will request assistance from the LAFCo Executive Director to help facilitate the meetings. All meetings will be virtual meetings.

### TASK 3 RURAL FIRE PROTECTION DISTRICTS ALTERNATIVE GOVERNANCE STUDY

**Alternative Governance and Service Model:** This task includes the development of an alternative governance and service delivery model aimed at enhancing efficiency and effectiveness based on information provided in the service evaluation and analysis. We anticipate that a consolidation of districts into three geographical regions would be a likely alternative. The following provides that scenario:

1. Creation of a North County Fire Authority that includes the City of Lodi, Liberty FPD, Woodbridge FPD, Mokelumne FPD, Thornton FPD and Clements FPD.
2. Creation of a Central County Fire Authority that includes the City of Stockton, Montezuma FPD, Waterloo-Morada FPD, Colleeville FPD, Farmington FPD, Linden-Peters FPD and French-Camp McKinley FPD.
3. Creation of a Southeast County Fire Authority that includes the City of Manteca, Lathrop-Manteca FPD, Ripon Consolidated FPD, and Escalon Consolidated FPD.

Other alternatives could include reorganizations, annexations, and dissolutions of agencies.

**Fiscal Analysis of Governance Alternatives:** Berkson, working in close collaboration with the affected fire service agencies, will evaluate fiscal implications, issues, and options of governance alternatives. The goal is to help the agencies and other stakeholders, including LAFCO and the public, understand the feasibility of potential governance alternatives and steps towards their implementation.

**Preparation of Budgets for Governance Alternatives:** Following initial agency review of potential JPA and other governance alternatives, budgets will be constructed for each alternative based on current agency budgets and trends. The JPA and other governance alternative budgets will utilize current staffing and service levels and identify potential future cost and revenue changes. For example, future cost savings could include realignment of existing staff and administrative and other operating efficiencies.

**Implementation:** The report will identify issues and options related to governance alternatives, and provide an update to the 2011 implementation plan. Specific steps to address these issues and further analysis that may be necessary will be described. The implementation will focus on those alternatives that result from the updated analysis of existing MSR options, and direction from the affected agencies.

### TASK 4 PROJECT MANAGEMENT/ADMINISTRATION/MEETINGS

This task will involve coordination efforts of the project manager and staff throughout the project. This task also involves contract administration, invoicing, scheduling, budgeting, etc. and support to LAFCO staff as needed.



SCHEDULE

<i>Project Task</i>	<i>Time (days)</i>	<i>Start</i>	<i>Finish</i>
<b>Project Initiation</b>			
Refine scope/schedule	5	15-Jan-25	20-Jan-25
Conference Call w/ LAFCo re: communication, deliverables	5	20-Jan-25	25-Jan-25
Research and Collect background documents	10	25-Jan-25	4-Feb-25
<b>Service Evaluation and Analysis</b>			
Schedule Meetings with Fire Districts	30	4-Feb-25	6-Mar-25
Initial Meetings with Fire Districts (19)	30	6-Mar-25	5-Apr-25
Update Service Review - 1st Admin Draft by LAFCo	90	5-Apr-25	4-Jul-25
Financial Analysis (Berkson)	90	5-Apr-25	4-Jul-25
<i>LAFCo Review</i>	<i>30</i>	<i>4-Jul-25</i>	<i>3-Aug-25</i>
Revise Service Review - 2nd Admin Draft by LAFCo	45	3-Aug-25	17-Sep-25
<i>LAFCo Review</i>	<i>21</i>	<i>17-Sep-25</i>	<i>8-Oct-25</i>
Revise Service Review - 3rd Admin Draft by Fire Districts	15	8-Oct-25	23-Oct-25
<i>Fire District Review</i>	<i>30</i>	<i>23-Oct-25</i>	<i>22-Nov-25</i>
Schedule Follow-up Meetings with Fire Districts	15	22-Nov-25	7-Dec-25
Follow-up Meetings with Fire Districts (19)	15	7-Dec-25	22-Dec-25
Revise Service Review - Final Draft	45	22-Dec-25	5-Feb-26
<b>Rural Fire Protection District Alternative Governance Study</b>			
Prepare Alternative Model Concepts - 1st Admin Draft by LAFCo	30	5-Feb-26	7-Mar-26
<i>LAFCo Review</i>	<i>14</i>	<i>7-Mar-26</i>	<i>21-Mar-26</i>
Update Alternative Model Concepts - 2nd Admin Draft by LAFCo	14	21-Mar-26	4-Apr-26
Schedule Follow-up Meetings with Fire Districts	30	4-Apr-26	4-May-26
Initial Meetings with Fire Districts (19) re: Alternative Model Concepts	30	4-May-26	3-Jun-26
Survey Fire Districts re: Alternative Model Concepts	7	3-Jun-26	10-Jun-26
Prepare Survey Results Memo for LAFCo to evaluate	14	10-Jun-26	24-Jun-26
<i>LAFCo Review</i>	<i>7</i>	<i>24-Jun-26</i>	<i>1-Jul-26</i>
Prepare a preferred Alternative Model based on LAFCO direction	30	1-Jul-26	31-Jul-26
<i>Prepare Financial Analysis of preferred Alternative Model (Berkson)</i>	<i>30</i>	<i>31-Jul-26</i>	<i>30-Aug-26</i>
<b>Hearings/Presentations</b>			
LAFCo Presentation of Alternative Model	30	30-Aug-26	29-Sep-26



**BUDGET**

Task #	Task Description	McMurtry Project Manager \$210	Erwin Prin. Planner \$185	Carroll Senior Planner \$175	Smith Senior Planner \$175	DeMartino GIS \$145	Berkson Financial \$250	Bitters Fire Consultant \$185	Totals
<b>A Project Initiation</b>									
A.1	Refine scope/schedule	2.0							2.0
A.2	Conference Call w/ LAFCo re: communication, deliverables	1.0	1.0	1.0	1.0				4.0
A.3	Research and Collect background documents	4.0	4.0	4.0	4.0		20.0		36.0
	<i>Subtotal</i>	7.0	5.0	5.0	5.0	0.0	20.0		42.0
	<i>Task A</i>	\$ 1,470.00	\$ 925.00	\$ 875.00	\$ 875.00	\$ -	\$ 5,000.00	\$ -	\$ 9,145.00
<b>B Service Evaluation and Analysis</b>									
B.1	Schedule Meetings with Fire Districts			8.0				8	16.0
B.2	Initial Meetings with Fire Districts (19)	30.0		30.0				30	90.0
B.3	Schedule Follow-up Meetings with Fire Districts			8.0				8	16.0
B.4	Follow-up Meetings with Fire Districts (19)	30.0		30.0				30	90.0
B.5	Update Service Review - 1st Admin Draft by LAFCo	18.0	20.0	152.0	152.0	40.0		20	402.0
B.6	Revise Service Review - 2nd Admin Draft by LAFCo	8.0	12.0	25.0	25.0	12.0			82.0
B.7	Revise Service Review - 3rd Admin Draft by Fire Districts					6.0			6.0
B.7	Revise Service Review - Final Draft					2.0			2.0
B.8	Financial Analysis (Berkson)						180.0		180.0
B.9	Administration/Project Management/Meetings	52.0	16.0	12.0	12.0	6.0	16.0		114.0
	<i>Subtotal</i>	138.0	48.0	265.0	189.0	66.0	196.0	96.0	998.0
	<i>Task B</i>	\$ 28,980.00	\$ 8,880.00	\$ 46,375.00	\$ 33,075.00	\$ 9,570.00	\$ 49,000.00	\$ 17,760.00	\$ 193,640.00
<b>C Rural Fire Protection District Alternative Governance Study</b>									
C.1	Prepare Alternative Model Concepts - 1st Admin Draft by LAFCo	8.0	10.0	12.0	12.0	12.0			54.0
C.2	Update Alternative Model Concepts - 2nd Admin Draft by LAFCo	6.0	6.0	8.0	8.0	6.0			34.0
C.3	Schedule Follow-up Meetings with Fire Districts			8.0				8	16.0
C.4	Initial Meetings with Fire Districts (19) re: Alternative Model Concepts	30.0		30.0				30	90.0
C.5	Survey Fire Districts re: Alternative Model Concepts	4.0	8.0	8.0				4	24.0
C.6	Prepare Survey Results Memo for LAFCo to evaluate	6.0	8.0	12.0					26.0
C.7	Prepare a preferred Alternative Model based on LAFCo direction	4.0	4.0	16.0		6.0			30.0
C.8	Prepare Financial Analysis of preferred Alternative Model (Berkson)						124.0		124.0
C.9	Administration/Project Management/Meetings	32.0	6.0	6.0	6.0	2.0	8.0		60.0
	<i>Subtotal</i>	90.0	42.0	100.0	26.0	26.0	132.0	42.0	458.0
	<i>Task C</i>	\$ 18,900.00	\$ 7,770.00	\$ 17,500.00	\$ 4,550.00	\$ 3,770.00	\$ 33,000.00	\$ 7,770.00	\$ 93,260.00
<b>D Administration/Project Management/Meetings</b>									
D.1	Project Management/Coordination								
D.2	Meetings and Presentation/LAFCo Support								
	<i>Subtotal</i>								
	<i>Task D</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>De Novo Project Subtotals</b>									
	Project Subtotal Hours	235.0	95.0	370.0	220.0	92.0	348.0	138.0	1498.0
	Project Subtotal Cost	\$ 49,350.00	\$ 17,575.00	\$ 64,750.00	\$ 38,500.00	\$ 13,340.00	\$ 87,000.00	\$ 25,530.00	\$ 296,045.00
<b>Total Project Cost</b>									\$ 296,045.00



# De Novo Planning Group

A Land Use Planning, Design, and Environmental Firm

# De Novo Planning Group

A Land Use Planning, Design, and Environmental Firm

De Novo is committed to practices that demonstrate sustainability and stewardship. Our company provides a working environment that enables our team members to make contributions to improving the environment in which we live.

## **Sacramento Area Office**

1020 Suncast Lane, Suite 106 | El Dorado Hills, CA 95762  
info@denovoplanning.com | TEL 916-580-9818

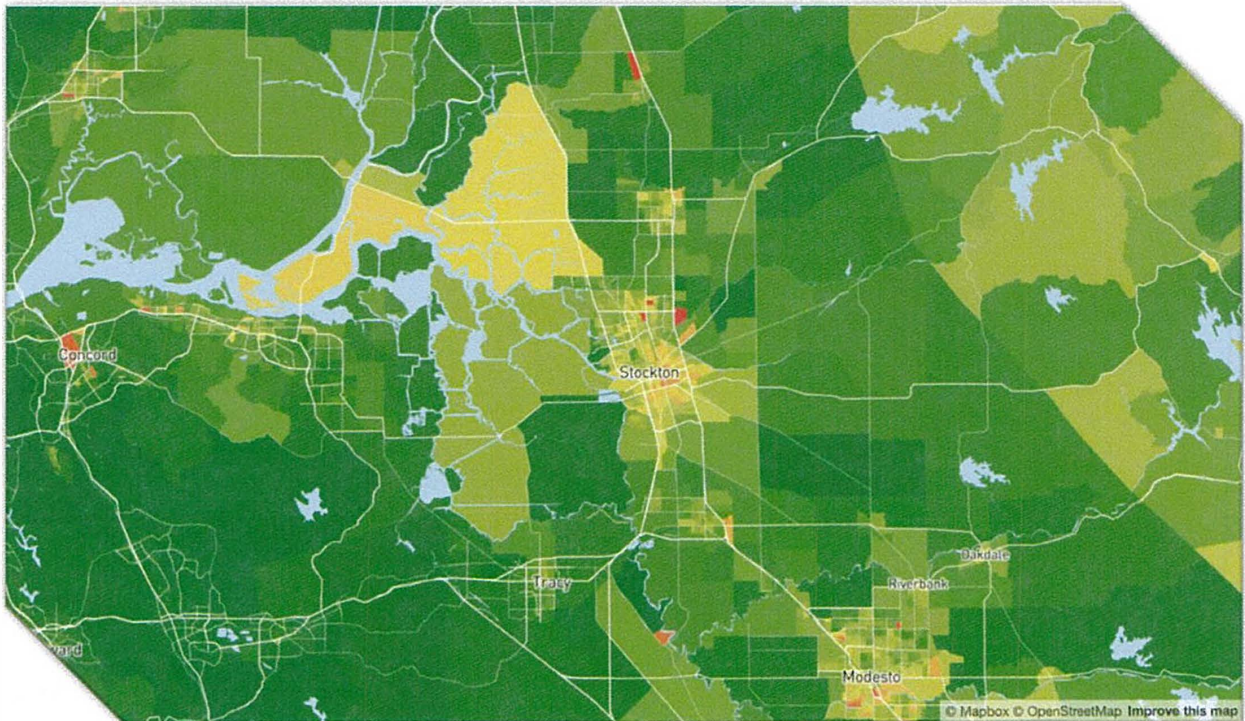
## **Southern California Office**

180 East Main Street # 108 | Tustin, CA 92780  
info@denovoplanning.com | TEL 714-453-7711



# Attachment 4

## **FIRE AND EMERGENCY SERVICES IN RURAL SAN JOAQUIN COUNTY ALTERNATIVE GOVERNANCE AND SERVICE REVIEW STUDY**



Deadline: December 10, 2024 | Prepared by LZH CONSULTING LLC |  
Address: 5630 Samter Ct, Tampa, FL 33611 | Cell: (813) 802-8882 |  
Email: linda@lzh-consulting.com

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**RESUMES ATTACHED .....17**



LZH Consulting LLC  
5630 Samter Ct  
Tampa FL 33611

December 9, 2024

San Joaquin LAFCO  
J. D. Hightower  
[44 N San Joaquin St, Suite 374  
Stockton, CA 95202

**RE: REQUEST FOR PROPOSALS FOR FIRE AND EMERGENCY SERVICES IN RURAL  
SAN JOAQUIN COUNTY ALTERNATIVE GOVERNANCE AND SERVICE REVIEW STUDY**

Dear Executive Officer,

I am writing to express interest and submit LZH Consulting's bid for the San Joaquin LAFCO's Rural Fire MSR and Alternative Governance Study Request for Proposal (RFP), as advertised. With a comprehensive background in local government analysis, fire and emergency services, and a deep understanding of California's local government laws and regulations, the LZH Consulting team is confident in our ability to conduct and complete the Rural Fire MSR and Alternative Governance Study on time and within budget.

The LZH team is a unique group of previous LAFCO staff members and consultants, we are experts for conducting detailed analyses of municipal services, specifically fire and emergency medical services, and for facilitating collaborative efforts among cities, special districts, and other stakeholders. Our experience aligns with the key responsibilities outlined in the RFP, particularly in analyzing fire and emergency services operations, understanding national standards like NFPA 1710 and NFPA 1720, and navigating California's complex local government framework, including the CKH Act and LAFCO processes.

The LZH team has regularly presented staff recommendations to public officials and advisory boards, leveraging both qualitative and quantitative research to inform decision-making on municipal service reviews, sphere of influence studies, and jurisdictional changes. Our experience in managing multi-agency cooperation, facilitating public input processes, and interpreting financial and planning documents makes our team the ideal consultant to navigate the complex governmental structures and address the unique needs of local communities within San Joaquin County.

As a consultant for SJLAFCO, we would bring both technical expertise and a proven ability to manage projects within budget and on deadline. I am particularly excited about the opportunity to work on service reviews, reorganizations, and foster collaboration between agencies to drive sustainable and effective fire and emergency services delivery across jurisdictions.

I am confident that our qualifications, along with our commitment to providing clear, actionable insights to local agencies, will make the LZH team a valuable asset to your organization. I would welcome the opportunity to further discuss how our experience and skills that align with SJLAFCO's goals and how we can contribute to the important work.



Thank you for considering my application. I look forward to the possibility of contributing to the success of SJLAFCO.

Sincerely,

*Linda Heckenkamp*

Linda Zambito Heckenkamp, Principal/ Founder  
LZH Consulting LLC | [linda@lzh-consulting.com](mailto:linda@lzh-consulting.com) | (813) 802-8882



## **MEET THE TEAM**

**Linda Zambito Heckenkamp** (Primary Contact)  
Principal/ Founder, LZH Consulting LLC  
5630 Samter Ct, Tampa FL 33611 | [linda@lzh-consulting.com](mailto:linda@lzh-consulting.com) | (813) 802-8882

Linda was a San Diego County LAFCO staff member for four years where she served as the LAFCO Liaison to the San County Fire Chiefs Association and the California Special District Association. LZH Consulting LLC was founded during the COVID pandemic when Linda continued to assist San Diego LAFCO and expanded her LAFCO services to other counties including El Dorado, Humboldt, Shasta, and Solano. Linda is also an inaugural Fellow for the Lincoln Vibrant Communities Initiative by the Lincoln Institute of Land Policy. She holds degrees in Public Administration and Policy, Landscape Architecture and Urban Design, and is currently completing an Advanced Practice Graduate Certificate in Public Sector Leadership. She is the recipient of the Anne Frank Humanitarian Award from the Florida Holocaust Museum, a 2x AmeriCorps Alumni, and a CALAFCO Silver Associate Member.

**Paula Graf**  
Associate, LZH Consulting LLC (Palm Springs, CA)

Paula was an Imperial LAFCO staff member for nine years beginning in 2015 and was appointed LAFCO Executive Officer in 2023 overseeing a budget of approximately \$0.8 million and three staff members. Paula has been a CALAFCO conference speaker and presenter numerous times. Prior to joining LAFCO, Paula worked as an accounting manager and assistant property manager in the energy and real estate sectors, respectively. She is a graduate of Imperial Valley Regional Occupational Program and is currently pursuing a degree at the College of the Desert in Natural Resources Conservation/ GIS.

**Stephen Abbott**  
Sub-Consultant, Stephen Abbott Consulting LLC (San Diego, CA)

Stephen started his career in public safety as a Firefighter/Paramedic with the North County Fire Protection District (NCFPD) in 1990, becoming a Chief Officer in 2001. He was Fire Chief from December 2015 and retired in 2021. During his tenure he was responsible for considerable organizational, service delivery, and financial restructuring. He holds an A.S. degree in Fire Science, a B.S. degree in Fire Administration, a M.A. in public administration (MPA), is a graduate of the National Fire Academy (NFA) Executive Fire Officer program (EFO) and the International Association of Fire Chiefs (IAFC) Fire Service Executive Development Institute program (FSEDI) and holds Chief Fire Officer (CFO) designation from the Center for Public Safety Excellence (CPSE). In addition to serving in the fire service, he has also maintained substantial community involvement, to include an 8-year term on the Board of Directors for the Fallbrook Regional Health District (serving 4 consecutive years as Board President), an 8-year term on the San Diego County Emergency Medical Care Committee (EMCC), 7 years on a Type II Federal Incident Management Team (IMT) to include 3 years as a Plans Section Chief, and 3 years as Chair of the San Diego County Fire Districts Association.

**IDENTIFICATION OF RESPONDER**



BA20220420084



**STATE OF CALIFORNIA**  
*Office of the Secretary of State*  
**STATEMENT OF INFORMATION**  
**LIMITED LIABILITY COMPANY**  
 California Secretary of State  
 1500 11th Street  
 Sacramento, California 95814  
 (916) 653-3516

For Office Use Only  
**-FILED-**  
 File No.: BA20220420084  
 Date Filed: 6/23/2022

<b>Entity Details</b>	
Limited Liability Company Name	LZH CONSULTING LLC
Entity No.	202250111684
Formed In	FLORIDA
<b>Street Address of Principal Office of LLC</b>	
Principal Address	1512 E 12TH AVE. UNIT 224 TAMPA, DE 33605
<b>Mailing Address of LLC</b>	
Mailing Address	1512 E 12TH AVE. UNIT 224 TAMPA, DE 33605
Attention	
<b>Street Address of California Office of LLC</b>	
Street Address of California Office	1512 E 12TH AVE. UNIT 224 TAMPA, CA 33605
<b>Manager(s) or Member(s)</b>	
<b>Manager or Member Name</b>	<b>Manager or Member Address</b>
+ Linda Zambito	1512 E 12TH AVE. UNIT 224 TAMPA, DE 33605
<b>Agent for Service of Process</b>	
California Registered Corporate Agent (1505)	LEGALZOOM.COM, INC. Registered Corporate 1505 Agent
<b>Type of Business</b>	
Type of Business	Consulting Services
<b>Email Notifications</b>	
Opt-in Email Notifications	No, I do NOT want to receive entity notifications via email. I prefer notifications by USPS mail.
<b>Chief Executive Officer (CEO)</b>	
<b>CEO Name</b>	<b>CEO Address</b>
None Entered	
<b>Labor Judgment</b>	
No Manager or Member of this Limited Liability Company has an outstanding final judgment issued by the Division of Labor Standards Enforcement or a court of law, for which no appeal therefrom is pending, for the violation of any wage order or provision of the Labor Code.	





BA20241757161



**STATE OF CALIFORNIA**  
*Office of the Secretary of State*  
**STATEMENT OF INFORMATION**  
**LIMITED LIABILITY COMPANY**  
 California Secretary of State  
 1500 11th Street  
 Sacramento, California 95814  
 (916) 657-5448

For Office Use Only  
**-FILED-**  
 File No.: BA20241757161  
 Date Filed: 10/1/2024

B3084-1069 10/01/2024 3:07 PM Received by California Secretary of State

<b>Entity Details</b>					
Limited Liability Company Name	Stephen Abbott Consulting LLC				
Entity No.	202463914432				
Formed In	CALIFORNIA				
<b>Street Address of Principal Office of LLC</b>					
Principal Address	850 BEECH STREET UNIT 706 SAN DIEGO, CA 92101				
<b>Mailing Address of LLC</b>					
Mailing Address	850 BEECH STREET UNIT 706 SAN DIEGO, CA 92101				
Attention					
<b>Street Address of California Office of LLC</b>					
Street Address of California Office	None				
<b>Manager(s) or Member(s)</b>					
<table border="1"> <thead> <tr> <th>Manager or Member Name</th> <th>Manager or Member Address</th> </tr> </thead> <tbody> <tr> <td>+ Stephen Abbott</td> <td>850 BEECH ST 706 SAN DIEGO, CA 92101</td> </tr> </tbody> </table>		Manager or Member Name	Manager or Member Address	+ Stephen Abbott	850 BEECH ST 706 SAN DIEGO, CA 92101
Manager or Member Name	Manager or Member Address				
+ Stephen Abbott	850 BEECH ST 706 SAN DIEGO, CA 92101				
<b>Agent for Service of Process</b>					
California Registered Corporate Agent (1505)	ZENBUSINESS INC. Registered Corporate 1505 Agent				
<b>Type of Business</b>					
Type of Business	Fire Protection Consulting				
<b>Email Notifications</b>					
Opt-in Email Notifications	Yes, I opt-in to receive entity notifications via email.				
<b>Chief Executive Officer (CEO)</b>					
<table border="1"> <thead> <tr> <th>CEO Name</th> <th>CEO Address</th> </tr> </thead> <tbody> <tr> <td colspan="2">None Entered</td> </tr> </tbody> </table>		CEO Name	CEO Address	None Entered	
CEO Name	CEO Address				
None Entered					
<b>Labor Judgment</b>					
No Manager or Member, as further defined by California Corporations Code section 17702.09(a)(8), has an outstanding final judgment issued by the Division of Labor Standards Enforcement or a court of law, for which no appeal is pending, for the violation of any wage order or provision of the Labor Code.					



## **SELECT PAST PROJECTS**

### **Oceanside Region MSR (2024)**

City of Oceanside  
Morro Hills CSD  
Oceanside Small Craft Harbor District  
- Responsibilities: Financial Overview,  
Data Collection & Analysis, Fire/ EMS

### **El Dorado County Cities MSR (2023)**

Cameron Park CSD  
City Of Placerville  
City Of South Lake Tahoe  
- Responsibilities: Financial Overview,  
Data Collection & Analysis

### **Fallbrook Region MSR (2022)**

Fallbrook PUD  
North County FPD  
Rainbow MWD  
CSA No. 81 (Fallbrook Local Parks)  
- Responsibilities: Financial Overview,  
Data Collection & Analysis

### **Resource Conservation Districts MSR (2021)**

Mission RCD  
RCD of Greater San Diego County  
Upper San Luis Rey RCD  
- Responsibilities: Project Manager

### **Valley Center Region MSR (2020)**

Valley Center CSD  
Valley Center FPD  
Valley Center MWD  
- Responsibilities: Project Manager

### **San Diego County SD MSR (2019)**

Alpine-Lakeside Service Area  
Campo Service Area  
East Otay Mesa Service Area  
Julian Service Area  
Pine Valley Service Area  
Spring Valley Service Area  
Winter Gardens Service Area  
- Responsibilities: Project Manager

### **Julian Region MSR (2019)**

Cuyamaca WD  
Julian CSD  
Julian-Cuyamaca FPD  
Lake Cuyamaca RPD  
Majestic Pines CSD  
Wynola WD  
- Responsibilities: Project Manager



## **REFERENCES**

Keene Simonds, Executive Officer,  
San Diego LAFCO  
[Keene.Simonds@sdcountry.ca.gov](mailto:Keene.Simonds@sdcountry.ca.gov)  
(619) 321-3380  
2550 Fifth Avenue, Suite 725  
San Diego, CA 92103

Priscilla Mumpower, Assist. Executive Officer, San Diego LAFCO  
[Priscilla.Mumpower@sdcountry.ca.gov](mailto:Priscilla.Mumpower@sdcountry.ca.gov)  
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San Diego, CA 92103

Luis Tapia, Assistant Executive Officer  
[ltapia@oclafco.org](mailto:ltapia@oclafco.org)  
2677 North Main Street, Suite 1050  
Santa Ana, CA 92705  
(714) 640-5100 -Office

Crystal Craig  
Assistant Executive Officer  
[Ccraig@lafco.org](mailto:Ccraig@lafco.org) | (951) 312-6494  
6216 Brockton Avenue, Suite 111-B  
Riverside, CA 92506

Jo Mackenzie  
Vista ID + SDLAFCO Commissioner (past Chair)  
1391 Engineer St. Vista, CA 92081  
[mackgroup@cox.net](mailto:mackgroup@cox.net) | (760) 402-3975

Jack Bebee  
Fallbrook PUD General Manager + SDLAFCO Special District member  
990 E Mission Rd, Fallbrook, CA 92028  
[jackb@fpud.com](mailto:jackb@fpud.com) | (760) 728-1125



## **SCOPE OF SERVICES**

- Send Notice of Intents and set up introductory meetings.
- Complete site visits as needed.
- Prepare municipal service reviews (MSRs) and its content such as: researching special district background, boundaries, demographic and organizational data, service capacity and demands, infrastructure, and financial ability.
- Data collection, including but not limited to, interviews, surveys and research of existing information and documents including past service review and SOI studies, past organization records, and other research.
- Work with the GIS Analyst to obtain demographic data from the county's portal.
- Work with the Commission Clerk to obtain a city or special district point of contact in LAFCO's directory.
- Attend or observe the associated city or special districts virtual community meetings for information to include in the MSRs as needed.
- Set up and maintain correspondence with the city or special districts LAFCO point of contact to ensure timely and accurate data and MSRs drafts.
- Prepare and present MSR drafts and findings during commission and/or Ad Hoc Committee meetings as needed.
- Obtain and archive public feedback as needed.
- Attend in-person and/ or virtual internal and external staff meetings as needed.
- Prepare sphere of influence updates as needed.
- Organize supporting documents to be delivered to San Joaquin LAFCO.
- Review LAFCO staff MSR draft edits and feedback as needed.
- Produce an administrative draft of the Study with appropriate and actionable recommendations for LAFCO staff and fire agency staff to review. The Study must be readable and suitable for use by elected officials, service providers and the public. The consultant shall present issues in the most succinct manner possible while including necessary content and ensuring readability

## **APPROACH**

Municipal service reviews serve as a centerpiece to CKH’s enactment in 2001 and represent comprehensive studies of the level, range, and performance of governmental services provided within defined geographic areas. LAFCOs prepare municipal service reviews to explicitly inform subsequent sphere determinations. LAFCOs also prepare municipal service reviews irrespective of making any specific sphere determinations in order to obtain and furnish information to contribute to the overall orderly development of local communities. Municipal service reviews vary in scope and can focus on a particular agency or governmental service. LAFCOs may use the information generated from municipal service reviews to initiate other actions under their authority, such as forming, consolidating, or dissolving one or more local agencies. Advisory guidelines on the preparation of municipal service reviews were published by the Governor’s Office of Planning and Research in 2003 and remain the lone statewide document advising LAFCOs in fulfilling this mandate.

All municipal service reviews – regardless of their intended purpose – culminate with LAFCOs preparing written statements addressing seven specific service factors listed under G.C. Section 56430. This includes, most notably, infrastructure needs or deficiencies, growth and population trends, and financial standing. The seven mandated service factors are summarized below in short-form.

1. Growth and population projections for the affected area.
2. Location and characteristics of any disadvantaged unincorporated communities within or contiguous to affected spheres of influence.
3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies.
4. Financial ability of agencies to provide services.
5. Status and opportunities for shared facilities.
6. Accountability for community service needs, including structure and operational efficiencies.
7. Matters relating to effective or efficient service delivery as required by policy.

The **first part** the LZH Team will conduct is a streamlined service review of fire protection and emergency medical services for each of the 19 rural fire protection districts.

For each agency:

- a. Assess the level of current services, including response times, infrastructure, service coverage areas, equipment, and personnel.
- b. Analyze operational structures, governance frameworks, policies, and staffing levels of each agency.
- c. Perform a financial analysis, including operating budgets, revenues, expenses, debt obligations (including pensions), and funding sources.
- d. Project a five-year financial forecast considering anticipated population growth and service demand changes for each agency.

Each micro-profile will include:

**1.0 Overview (Introduction)**

**2.0 Background**

History/ Settlement

Incorporation Proceedings

Post-Incorporation Proceedings

**3.0 Boundaries**

Jurisdiction Boundary  
(SOL)

Land Use/ Zoning

**4.0 Demographics**



Population + Housing  
Age Distribution  
Income  
Other Socioeconomic Indicators  
**5.0 Organization**  
Governance  
Administration/ Staffing  
**6.0 Municipal Service Functions**  
Fire Protection/ EMS

Other Applicable Municipal  
Services  
**7.0 Other Amenities, Facilities,  
and Institutions**  
**8.0 Finances**  
Budget  
ACFR  
Measurements | Debt, Capital,  
Margins  
Pension Obligations

The **second part** informed by the 19 micro-profiles above will provide the baseline of information for the Rural Fire Protection Districts Alternative Governance Study and include the required information below as outlined in the original RFP:

- a. Develop alternative governance and service delivery models aimed at enhancing efficiency and effectiveness based on information provided in the service evaluation and analysis. Please include the below alternatives that would follow a similar model to the existing South County Fire Authority:
  1. Creation of a North County Fire Authority that includes the City of Lodi, Liberty FPD, Woodbridge FPD, Mokelumne FPD, Thornton FPD and Clements FPD.
  2. Creation of a Central County Fire Authority that includes the City of Stockton, Montezuma FPD, Waterloo-Morada FPD, Colledgeville FPD, Farmington FPD, Linden-Peters FPD and French-Camp McKinley FPD.
  3. Creation of a Southeast County Fire Authority that includes the City of Manteca, Lathrop-Manteca FPD, Ripon Consolidated FPD, and Escalon Consolidated FPD.

Other alternatives could include reorganizations, annexations, and dissolutions of agencies.

- b. Conduct a detailed cost-benefit analysis of the proposed alternatives taking into account possible operational efficiencies and eliminated redundancies.
- c. Recommend, as needed, new funding opportunities and financial strategies to sustain and improve services.
- d. Determine the most feasible/cost effective model for the agencies to consider.
- e. Include a plan of implementation for the recommended alternative governance model.

## METHODOLOGY

Several diagnostic tools are used to assess and make related determinations on the affected agency's level of service and financial solvency based on a review of available data and audited information. Financial analysis includes an emphasis on analyzing current ratio, debt-to-net assets, and total margins. These specific diagnostics provide the Commission with reasonable benchmarks to evaluate liquidity, capital, and margin and calculated to track overall trends and final-year standing.

The period for collecting data to inform the Commission's analysis and related projections on population growth, service demands, and finances has been set to cover the five-year fiscal period from 2020 to 2024 with limited exceptions (i.e. July 1, 2020 through June 30, 2024). This data collection period – which covers the 60 months immediately preceding the start of work on the document – purposefully aligns with the five-year timeline for the report with the resulting data trends appearing most relevant in making near-term projections, for example, data from the last five years is most pertinent in projecting trends over the next five years. Past and current residential population estimates in the report will draw on data generated by Esri and their own mapping analyses of census tracts. Other sources of data will be gathered from but not limited to:

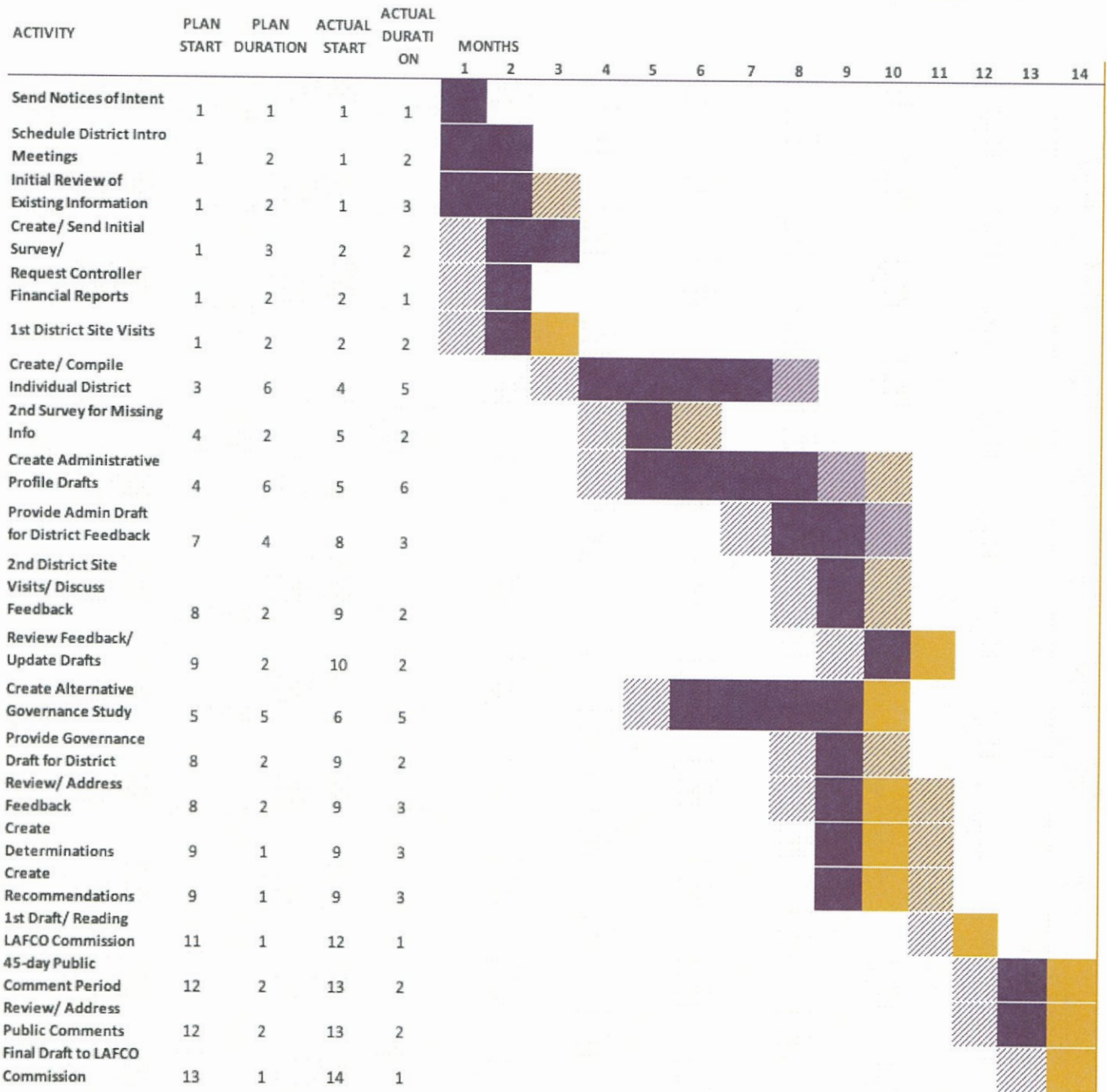
- Principal acts
- General plans/zoning ordinances
- Recent and proposed projects
- Master service plans
- Agency maps
- District/city policies governing financing and personnel
- Board, management and administrative manuals/procedures
- Existing spheres of influence
- Demographic information
- Projected growth
- Communities of interest
- Regional agencies providing support
- Criteria/best practices as used by appropriate industry groups
- Capital improvement plans
- Existing operating/capital improvement budgets
- Environmental impact reports, if applicable and/or available
- Existing joint agreements and contracts
- Current and planned financing plans for service upgrades and capacity improvements
- Agency bond ratings
- Agency investment policies
- Joint financing/shared facilities
- Agency budgets and financial reports, including revenue sources and expenditures
- District cost avoidance practices
- Insurance
- Customer needs and preferences
- Per unit service cost
- Competitive bid policies
- Comparable rate information
- Current organizational chart
- Mission statement
- Continuing education/training
- Staffing levels
- Opportunity for customer comments
- Available revenues
- Amounts and types of reserves
- Adopted policies for reserves
- Asset disposition plan
- Property tax increment (AB 8 share)/Gann limit
- Surplus property policies
- Board policies and practices
- Days/hours of operation
- Annual reports/status reports
- Newsletters
- Voter participation

## TIMELINE

The proposed timeline below plans for work to begin the 1<sup>st</sup> month and to be completed with the final draft to the Commission Hearing by the 12<sup>th</sup> month. Possible delays/ continuations have been outlined.

### Proposed Fire MSR & Governance Study Timeline

LEGEND:  Plan Duration  Actual Start  % Complete  Possibly Beyond Plan  % Complete



## BUDGET

The proposed targeted average rate is \$75 per hour. The proposed budget consists of the breakdown below:

	Budgeted Costs	Hours	Not to Exceed Costs	Hours
<b>Tasks</b>				
<b>Direct Costs</b>				
19 Individual FPD micro-Profiles	\$142,500.00	1,900	\$156,750.00	2,090
Alternative Governance Study	\$35,625.00	475	\$39,150.00	522
<b>Indirect Costs</b>				
Travel/ Lodging to Site Visits/ Meetings	\$1,950.00	26	\$2,550.00	34
Miscellaneous	\$500.00	n/a	\$750.00	n/a
	<b>\$180,575.00</b>	<b>2,401</b>	<b>\$199,200.00</b>	<b>2,646</b>

Each team member's role and hourly rate slightly differs and consists of the breakdown below:

- LZH Principal: \$75/ hr
- LZH Associate: \$60/ hr
- LZH Graduate Intern: \$15/ hr
- Fire Sub-consultant: \$75/ hr

**Direct Costs** are associated with the research, data collection, outreach, surveying interpretation and analysis, writing and reporting, etc. while the **Indirect Costs** are associated with travel, lodging, meals, etc. while conducting site visits and attending and presenting at the Commission Public Hearings.

The LZH team projects **each individual micro profile** will take up to 100 hours (total 1,900 hours) with a 10% buffer to provide a light snapshot of the cities and CALFIRE operations via the supplemental questionnaire/ survey. This projection pertinently assumes the Valley Regional Communication Center provides dispatch for all 19 rural FPDs. **The Alternative Governance Study** is projected to consist of a quarter of the total time it will take to conduct and complete the micro profiles (total 475 hours). The total costs incorporate project related travel and expenses and any possible continuation of the agenda items.

All work is billed on a time and materials basis with monthly invoices identifying progress completed for each task, hours expended and the hourly rate. Additional services outside the scope of work may require a contract amendment.

**ITEMS REQUIRED**

Other Information Required in Proposal:

The LZH provides a positive statement that it has the required insurance policies in force in acceptable amounts of coverage for Professional Liability, Workers Compensation, Comprehensive General Liability and Auto (Owned and Non-Owned). Prior to any commencement of services, the firm will be required to provide certificates of insurance coverage to LAFCO as stated in the original RFP.








RESUMES ATTACHED



# Linda Heckenkamp

linda.heckenkamp@gmail.com   
(813) 802-8882   
www.linkedin.com/in/lheckenk/ 

Foster care alumna cultivated into an advocate for governance reform, turned landscape urbanist & planner. Seeking to connect people to equitable, resilient, and livable communities and places. Jack of many trades.

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## Skills

- Leadership, mentorship, and public speaking.
- Project management, budgets, and schedules.
- Research, analysis, writing & implementation.
- Public sector budgeting & financial analysis.
- Strategic planning and community outreach.
- Municipal and environmental planning.
- Adobe CS, CADD, Esri GIS, 3D rendering.
- Consulting and business development.

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## Experience

FEBRUARY 2022 – PRESENT | REGISTERED TO OPERATE IN CALIFORNIA AND FLORIDA

### **Founder+ / LZH Consulting, LLC**

*Owner/ operator of an urban and regional planning consultancy collaborating with municipalities, special districts, and community stakeholders to guide regional growth and development for the future.*

- Ensure clients achieve regulatory planning and environmental policy standards by conducting state-mandated comprehensive studies, e.g. Environmental Impact Reports, Housing/Land Use Plans, Municipal Service Reviews, Sphere of Influence Reports, and public financial analysis.
- Provide conclusive next steps, end-to-end project completion and/or specific tasks as needed.
- Facilitate virtual/ in-person public meetings, participatory community outreach, and engagement.
- Manage long- and short-term contract timelines, (<\$125,000) budgets and schedules; Coordinate with clients, stakeholders, independent contractors, and subcontractors.

APRIL 2018 – JANUARY 2022 | SAN DIEGO COUNTY, CA

### **Senior Analyst / San Diego County Local Agency Formation Commission**

*Quasi-legislative regional planning body formed to promote orderly growth, discourage urban sprawl, preserve open space and agricultural lands, and provide regulatory oversight to municipal agencies.*

- Presented staff recommendations to public officials, advisory boards, and the public based on five-year analysis for municipal services, e.g. fire/EMS, potable water, wastewater, ports, roads, etc.
- Prepared qualitative/ quantitative comprehensive studies; Monitored baseline trends and KPIs.
- Processed jurisdictional changes according to federal/state/local land use and environmental laws.
- Mentor and train junior analysts and support staff; Provide support as Special District Liaison.

SUMMERS 2015/2016/2017 | SAINT LOUIS, MO

### **Graduate Planning Intern / Development Strategies, Inc.**

- Delivered market studies, appraisal reports to a diverse set of clients, e.g. municipalities, financial institutions, and real estate developers; Facilitated public engagement in pre-planning phase.

### **Landscape Design Intern / The Lawrence Group & DTLS Landscape Architecture**

- Created illustrative plans, perspective renderings, and construction drawings for residential, commercial, health care & mixed-use projects; Created marketing material & qualification packets for new clients.

### **Current River Watershed Intern / The Nature Conservancy in Missouri**

- Produced press-ready material used for education and outreach to provide new forest landowners best land management practices; Helped facilitate BMP workshops on sustainable timber harvest methods.

SEPTEMBER 2013 TO AUGUST 2014 | GREATER CHICAGO AREA

**Safe at Home Coordinator/ Rebuilding Together Metro Chicago**

*Launched the Safe at Home pilot program assisting low-income, elderly, and disabled homeowners to age safely in place by providing critical home repairs in the Metro Chicago and Cook County.*

- Managed a variety of volunteer groups (20 to 3,000 volunteers) during individual Corporate Giveback Days and National Rebuilding Day; Support volunteers and ensure project completion.
- Developed volunteer trainings and best practices; Set project scope based on mission and resources.

OCTOBER 2012 TO AUGUST 2013 | PACIFIC REGION

**Corps Member/ AmeriCorps National Civilian Community Corps**

*Addressed critical socioeconomic, energy, and infrastructure issues in under-served communities through direct national service projects in a team-based setting.*

- Trained and certified in basic life support (BLS), public safety, disaster relief, and flood mitigation.
- Completed four national service projects:
  - Round 1: Camp restoration at YMCA Camp Whittle serving inner city children in Big Bear, CA.
  - Round 2: Mobile IRS VITA-TCE Tax preparer for rural, low-income in Central Montana.
  - Round 3: Park maintenance and trail building at Cesar E. Chavez National Monument in Keene, CA.
  - Round 4: Construction crew for Tacoma/ Pierce County Habitat for Humanity in Washington.

MARCH 2011 TO JULY 2011 | WASHINGTON, D.C.

**U.S. Congressional Intern/ Congressional Coalition on Adoption Institute**

*Highly esteemed internship for young foster care alum to advise federal policymakers on legislative reform.*

- Created and presented a comprehensive federal policy report to the Administration for Children and Families, congressional members, Department of Health and Human Services, and other agencies.
- Researched other bipartisan issues as needed for the Committees on Ways and Means & Finance.

AUGUST 2007 TO MARCH 2012 | HEADQUARTERED IN TAMPA, FL

**Child Welfare Policy Consultant/ Connected by 25 Initiative**

*Assisted in the development of the first-ever federal reporting system, the National Youth in Transition Database (NYTD), to collect youth outcome data and inform measures for policy reform.*

- Assisted in the passage of two state child welfare reform bills (SB 2114/ HS 1215 and SB 1798/ HS 1607); Keynote speaker at each bill signing by Governor Jeb Bush and Governor Charlie Crist.

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## Education

2014 - 2017

**Masters of Landscape Architecture / Washington University in St. Louis**  
**+ Focus in Urban Design**

2008 - 2012

**Bachelor of Science in Public Administration / Florida International University**  
**+ Certificate in Public Policy**

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## Associations & Service

- Anne Frank Humanitarian Awardee
- American Planning Association
- Association of Environmental Professionals
- Data Visualization Society
- President's Volunteer Service Award

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## Publications

- [Municipal Service Reviews: Resource Conservation Districts](#)
- [Municipal Service Reviews: Julian Region](#)
- [Art, Ecology and Community in U City, MO](#)
- [Tracking Child Welfare Outcomes, pp 40-45](#)

## RESUME OF QUALIFICATIONS

### Stephen Abbott

850 Beech St. Unit 706, San Diego, CA 92101 · sabbott66@gmail.com · (760) 644-1107

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#### **OBJECTIVE:**

Utilize the totality of my professional and personal experiences to help shape the future direction of the provision of fire, EMS, & healthcare services

#### **EXPERIENCE and ACHIEVEMENTS:**

*Fire Service Consultant, San Diego Local Agency Formation Commission (LAFCO), Oct 2021 to present.* Summary: Regularly advise the Executive Officer on the availability, need, and adequacy of fire protection and related services as part of the Commission's regulatory and planning duties; Assist the Commission in the review of fire protection and related services as part of change of organization and reorganization proposals and municipal service reviews (MSR); be available, as needed, to attend and present to the Commission and the Commission's Special Districts Advisory Committee and Cities Advisory Committee; Serve as a liaison between LAFCO staff and local fire agency officials.

#### Key Accomplishments:

- Conducted MSRs for various cities and special districts, evaluating service sufficiency
- Formed working group to update municipal service review performance metrics
- Developed environmental and social equity presentation for County Fire Chiefs
- Developed new Municipal Service Review evaluation metric for lifeguard services

*Fire Chief, North Co. Fire Protection Dist., Dec 2015 to July 31, 2021.* Summary: Provide strategic direction to organization, making recommendations for service enhancements and efficiencies; Lead, mentor, evaluate department heads; review and monitor budget, planning for future needs; Develop District policies and procedures; Regularly communicate with Board of Directors, community leaders, and stakeholders; Represent District and be an active participant at various regional commissions, hearings, meetings, and task forces; Oversee/contribute to social media program; Serve on regional fire code appeals panel, County Emergency Medical Care Committee; Conduct labor contract negotiations and adjudication of employee disciplinary matters.

#### Key Accomplishments:

- Conducted pension forecast analysis, creating \$8M pension debt savings thru POB
- Restructured Department's budget, correcting long-standing structural deficit
- Worked with team to establish priority medical dispatch within San Diego North Zone
- Developed long-term Facility Replacement Plan, with funding mechanisms
- Negotiated tax exchange agreement in conjunction with annexation
- Conducted a joint analysis of alternative revenue sources
- Developed long-range financial forecasting tool
- Conducted fee schedule nexus study, resulting in 70% fee increases *without* opposition
- Reorganized department, adding positions at no additional cost.

- Created Joint Powers Agreement (JPA) with Regional Health District
- Closed obsolete fire station, absorbed volunteer fire department
- With consultant, developed facilities reserve study with accumulated depreciation schedule
- With consultant, developed feasibility analysis for pursuit of a special tax initiative
- Obtained multiple local, regional, and federal grants for facilities and equipment

*Division Chief/Deputy Chief Human Resources, Finance, and Administration, North County Fire Dept., 2014 to 2015.* Summary: Develop annual budget and monitor expenditures, contracts for services, and capital equipment purchases, make recommendations for modifications, including implementation of recommendations from annual audits; Provide oversight to finance, human resources, fleet maintenance, and IT divisions; Ensure maintenance and integrity of financial & personnel records and reports; Provide oversight for recruitment and promotional activities, manage departments industrial illness & injury program; Manage Department’s Hazardous Materials Business Plans; Update relevant policies and job descriptions.

Key Accomplishments:

- Conducted risk management impact analysis of work schedule change upon employee injury, accident, and leave utilization rates
- Revised employee performance appraisal process
- Conducted job classification studies for multiple positions
- Developed comprehensive capital equipment (asset management) plan
- Developed job-specific professional development program for multiple classifications
- Conducted comparative fiscal analysis of total compensation

*Board Member/Board President, Fallbrook Healthcare District, December 2011 to 2018.* Summary: As an elected official, serve as a liaison between District management and the community; Develop strategic direction and establish priorities; Identify funding priorities; work with regional NGOs to implement service level objectives; Serve as a “working” Board member by chairing various committees and assist District management with development of essential work product.

Key Accomplishments:

- Conducted facility master plan & leading recruitment of new CEO
- Led organization & community through hospital closure & sale
- Developed hospital closure contingency plan
- Established hospital lease termination contingency fund
- Aligned District’s grant program to Community Health Needs Assessment

*Shift Battalion Chief/Emergency Medical Services Chief, North County Fire Dept., 2006 to 2014.* Summary: Provide daily oversight to shift operational activities; mentor, coach and counsel assigned shift personnel; develop and provide training for assigned personnel, to include multi-agency training exercises; respond to and provide incident command for major emergencies; Plan, lead, and direct all elements of Departments Emergency Medical Services program, to include paramedic ambulance service, continuing education, and quality assurance; Serve as liaison between hospitals, County of San Diego, local healthcare stakeholders; Provide leadership for District’s emergency preparedness program and liaison with North County CERT

*Fire Marshal, North County Fire Dept., 2001 to 2005.* Summary: Develop, implement, and enforce local, State, and Federal codes and regulations; Review building, grading, sprinkler, alarm, and development plans; Conduct occupancy inspections to ensure compliance with fire & building codes; Plan and coordinate public education; Provide oversight for occupancy and new construction inspection programs; Develop various risk assessments and emergency plans; Supervise shift fire/arson investigators, conducting fire origin and cause investigations; Mentor, train and develop fire prevention staff; Meet with contractors, developers, local Planning Groups, CERT, FireSafe Council; Developed and implemented initial CERT curriculum and disaster drills and emergency preparedness fairs.

### **EDUCATION/CERTIFICATIONS:**

Center for Public Safety Excellence, Chief Fire Officer, 2021, 2018, 2015  
Intl. Assn. of Fire Chiefs, Fire Service Executive Development Institute, 2016  
California Incident Command System, Planning Section Chief, 2014  
National Fire Academy, Emmitsburg, Maryland. Executive Fire Officer, 2012  
Walden University, Minneapolis, MN. Master of Arts, Public Administration, 2007  
Calif. State Fire Marshal, Chief Officer, 1999  
State Certified Fire Marshal & Fire Investigator I  
Cogswell College, Sunnyvale, CA. Bachelor of Science Fire Administration, 1996

### **COMMUNITY ENGAGEMENT**

San Diego Fire Districts Association President, 2017-2021  
Club President, Fallbrook Village Rotary, 2019-2021, 2012-2013  
San Diego Fire Chiefs Association Rep. to SANDAG Public Safety Group, 2018-2020  
Planning Section, So. Cal. Fire Incident Management Team 2, 2009-2016  
Board Member, Public Agencies Self Insurance System, 2014-2016  
Fallbrook Community Planning Group, Circulation Committee, 2001-2005  
Presenter & public testimony at conferences, committee hearings

### **ACCOMPLISHMENTS**

County of San Diego Proclamation, contribution to public safety, 2021  
Community Service Award (x3), Senator Joel Anderson, 2017 & 2018  
IAFC Fire Service Executive Development Institute scholarship recipient, May 2015  
Chief Fire Officer Designate, Center for Public Safety Excellence, 2012, 2015, 2018  
Legacy Award, National Fire Academy Executive Fire Officer Program, April 2013

### **SYNOPSIS:**

Currently self-employed, serving as the fire service consultant for San Diego LAFCO since 2021, now developing service evaluation metrics for all out-of-hospital healthcare district related services. Recently completed fire & EMS MSR components for multiple local agencies. Retired from 31+ year career in emergency services, having been a central force in many change initiatives within the fire department, regional health district, and communities served. Proactive problem solver that looks forward to creatively addressing challenges through innovative and collaborative efforts. Possess strong analytical abilities, have developed many if not most financial planning tools being used by District today. Substantial experience on regional committees, management teams, boards, and local non-profits, incident/disaster management, often in a high-pressure and fast-paced environment.

**PROFESSIONAL REFERENCES:**

Ed Sprague, Associate Professor (Ret.)  
Palomar College  
1140 W. Mission Rd.  
San Marcos, CA 92069  
esprague@palomar.edu  
(760) 484-4404

Howard Salmon, Board Member (Ret.)  
Fallbrook Regional Health District  
138 S. Brandon Rd.  
Fallbrook, CA 92028  
hsalmon@hwsadvisors.com  
(801) 541-5045

Rachel Mason, Executive Officer  
Fallbrook Regional Health District  
138 S. Brandon Rd.  
Fallbrook, CA 92028  
rmason@fallbrookhealth.org  
(760) 731-9187

Kathleen Thuner, Board Member (Ret.)  
North County Fire Protection District  
2408 Gum Tree Lane  
Fallbrook, CA 92028  
etfarms@msn.com  
(760) 468-6545

Bob Hoffman, Board Member (Ret.)  
North County Fire Protection District  
330 S. Main Ave.  
Fallbrook, CA 92028  
bobshoffman@yahoo.com  
(760) 419-7875

Priscilla Mumpower, Asst. Exec. Officer  
San Diego LAFCO  
2550 5<sup>th</sup> Ave. Ste. 725  
San Diego, CA 92103  
priscilla.mumpower@sdcounty.ca.gov  
(619) 288-0687

Paula Graf  
442-250-6473  
paulamae85@outlook.com  
2475 E. Bellamy Rd.  
Palm Springs, CA 92262

### **Education and Training**

College of the Desert (Currently Attending)  
Natural Resources Conservation  
GIS (General Information Systems)  
Imperial Valley ROP Office Management 2001-2002  
Holtville High School Diploma 2000-2003

### **Skills Summary**

Microsoft 365: Word, Excel, PowerPoint, Exchange Canva, Google Docs, Dropbox, Zoom,  
Microsoft Teams CTI Yardi and Realm Lease Management GIS (General Information Systems)  
Skills and Knowledge Verbatim transcription Familiarity with Ralph M. Brown and Cortese-  
Knox-Hertzberg Acts Understanding of CEQA, budget, lease, and property management  
Collaboration and Tasks Work with local government agencies Manage accounts payable and  
receivable Conduct research, report writing, and presentations.

### **Experience**

**Imperial Local Agency Formation Commission                      2015-2024**  
**Staff, Executive Officer**

Administered an annual budget of \$800,000, carefully tracking expenses while pinpointing opportunities for savings and enhancements. Led a dedicated team of three, overseeing hiring processes, conducting annual performance reviews, and effectively delegating tasks. Managed the office building under LAFCO's guidance, handling routine maintenance and repairs, coordinating construction upgrades, and negotiating tenant lease agreements. Conducted in-depth studies on cities and special districts, preparing reports and presenting findings for Commission discussions. Carefully managed annexation projects, ensuring compliance through thorough reviews of application materials, evaluating CEQA documents, and delivering presentations to the Commission. Collaborated with CALAFCO to organize annual staff workshops and conferences. Accurately transcribed Commission meetings. Proactively monitored legislative changes that could affect LAFCO and updated policies and procedures as needed. Oversaw public records requests while nurturing relationships with local government agencies.



**EnergySource LLC****2011-2015****Accounts Payable Manager**

Supervised accounts payable by carefully reconciling invoices with purchase orders, obtaining necessary approvals, and entering data into QuickBooks for efficient payment processing. Developed, negotiated, and managed the entire lifecycle of purchase orders. Provided valuable insights to management during weekly staff meetings. Worked alongside various departments on special projects, ensuring financial records were accurate by reconciling monthly credit card statements. Maintained a well-organized filing system.

**CBL & Associates Property Management****2005-2011****Assistant Property Manager**

Developed, negotiated, and finalized lease agreements Marketed vacant units to attract potential tenants Verified that tenants maintained appropriate and current liability insurance Coordinated building maintenance and repairs with in-house staff or external contractors, ensuring quick resolution of maintenance requests Ensured the property and common areas were well-maintained and complied with safety regulations Oversaw more than 80 commercial lease accounts, including the collection of deposits, rent, and additional charges such as common area maintenance, late fees, and tenant violations Conducted monthly bank reconciliations as well as year-end reconciliations for common area maintenance and real estate tax fees.

**San Joaquin LAFCO Fire Services Study Proposal Comparison Checklist**

**Final Recommendation - RSG**

Most Competent Vendor: DeNovo  
 Best Value Vendor: LZH  
 Recommended Vendor: RSG

**Proposal Submission**

DeNovo	LZH	RSG
<p><b>Outside Cover Title</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> RFP Title:</li> <li><input checked="" type="checkbox"/> Submittal Due Date:</li> <li><input checked="" type="checkbox"/> Submitter Contact Information:</li> </ul> <p><b>Cover Letter</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Maximum 2 pages:</li> </ul> <p><b>Firm Identification Notes</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Legal Name and Address: De Novo Planning Group, Inc.</li> <li><input checked="" type="checkbox"/> Legal Form of Submitter: California Corporation</li> <li><input checked="" type="checkbox"/> Principal Contact Person Details: Steve McMurtry, Principal, (916) 580-9818.</li> </ul>	<p><b>Outside Cover Title</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> RFP Title:</li> <li><input checked="" type="checkbox"/> Submittal Due Date:</li> <li><input checked="" type="checkbox"/> Submitter Contact Information:</li> </ul> <p><b>Cover Letter</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Maximum 2 pages:</li> </ul> <p><b>Firm Identification Notes</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Legal Name and Address: LZH Consulting LLC</li> <li><input checked="" type="checkbox"/> Legal Form of Submitter: California Limited Liability Corporation</li> <li><input checked="" type="checkbox"/> Principal Contact Person Details: Linda Zambito</li> </ul>	<p><b>Outside Cover Title</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> RFP Title:</li> <li><input checked="" type="checkbox"/> Submittal Due Date:</li> <li><input checked="" type="checkbox"/> Submitter Contact Information:</li> </ul> <p><b>Cover Letter</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Maximum 2 pages:</li> </ul> <p><b>Firm Identification Notes</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Legal Name and Address: RSG, Inc</li> <li><input checked="" type="checkbox"/> Legal Form of Submitter: California S Corp</li> <li><input checked="" type="checkbox"/> Principal Contact Person Details: Jim Simon</li> </ul>

Attachment 5

## San Joaquin LAFCO Fire Services Study Proposal Comparison Checklist

### Final Recommendation - RSG

Most Competent Vendor: DeNovo

Best Value Vendor: LZH

Recommended Vendor: RSG

### Proposal Submission

DeNovo	LZH	RSG
<p><b>Outside Cover Title</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> RFP Title:</li> <li><input checked="" type="checkbox"/> Submittal Due Date:</li> <li><input checked="" type="checkbox"/> Submitter Contact Information:</li> </ul> <p><b>Cover Letter</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Maximum 2 pages:</li> </ul> <p><b>Firm Identification Notes</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Legal Name and Address: De Novo Planning Group, Inc.</li> <li><input checked="" type="checkbox"/> Legal Form of Submitter: California Corporation</li> <li><input checked="" type="checkbox"/> Principal Contact Person Details: Steve McMurtry, Principal, (916) 580-9818.</li> </ul>	<p><b>Outside Cover Title</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> RFP Title:</li> <li><input checked="" type="checkbox"/> Submittal Due Date:</li> <li><input checked="" type="checkbox"/> Submitter Contact Information:</li> </ul> <p><b>Cover Letter</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Maximum 2 pages:</li> </ul> <p><b>Firm Identification Notes</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Legal Name and Address: LZH Consulting LLC</li> <li><input checked="" type="checkbox"/> Legal Form of Submitter: California Limited Liability Corporation</li> <li><input checked="" type="checkbox"/> Principal Contact Person Details: Linda Zambito</li> </ul>	<p><b>Outside Cover Title</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> RFP Title:</li> <li><input checked="" type="checkbox"/> Submittal Due Date:</li> <li><input checked="" type="checkbox"/> Submitter Contact Information:</li> </ul> <p><b>Cover Letter</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Maximum 2 pages:</li> </ul> <p><b>Firm Identification Notes</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Legal Name and Address: RSG, Inc</li> <li><input checked="" type="checkbox"/> Legal Form of Submitter: California S Corp</li> <li><input checked="" type="checkbox"/> Principal Contact Person Details: Jim Simon</li> </ul>

## Qualifications Evaluation

DeNovo	LZH	RSG
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Fire/emergency services financing understanding</li> <li><input checked="" type="checkbox"/> National fire service standards expertise</li> <li><input checked="" type="checkbox"/> Fire department operations experience</li> <li><input checked="" type="checkbox"/> Governmental organization analysis</li> <li><input checked="" type="checkbox"/> California local government law expertise.</li> <li><input checked="" type="checkbox"/> CKH Act and LAFCO process knowledge</li> <li><input checked="" type="checkbox"/> Multi-agency input facilitation</li> <li><input checked="" type="checkbox"/> Public communication skills</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Fire/emergency services financing understanding</li> <li><input checked="" type="checkbox"/> National fire service standards expertise</li> <li><input checked="" type="checkbox"/> Fire department operations experience</li> <li><input checked="" type="checkbox"/> Governmental organization analysis</li> <li><input checked="" type="checkbox"/> California local government law expertise.</li> <li><input checked="" type="checkbox"/> CKH Act and LAFCO process knowledge</li> <li><input checked="" type="checkbox"/> Multi-agency input facilitation</li> <li><input checked="" type="checkbox"/> Public communication skills</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Fire/emergency services financing understanding</li> <li><input checked="" type="checkbox"/> National fire service standards expertise</li> <li><input checked="" type="checkbox"/> Fire department operations experience</li> <li><input checked="" type="checkbox"/> Governmental organization analysis</li> <li><input checked="" type="checkbox"/> California local government law expertise.</li> <li><input checked="" type="checkbox"/> CKH Act and LAFCO process knowledge</li> <li><input checked="" type="checkbox"/> Multi-agency input facilitation</li> <li><input checked="" type="checkbox"/> Public communication skills</li> </ul>

### Team Qualifications

DeNovo	LZH	RSG
<ul style="list-style-type: none"> <li><input type="checkbox"/> Detailed résumés provided</li> <li><input checked="" type="checkbox"/> Sub-consultant information complete</li> <li><input type="checkbox"/> Team member availability confirmed</li> <li><input checked="" type="checkbox"/> Relevant project references (last 5 years)</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Detailed résumés provided</li> <li><input checked="" type="checkbox"/> Sub-consultant information complete</li> <li><input type="checkbox"/> Team member availability confirmed</li> <li><input checked="" type="checkbox"/> Relevant project references (last 5 years)</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Detailed résumés provided</li> <li><input checked="" type="checkbox"/> Sub-consultant information complete</li> <li><input checked="" type="checkbox"/> Team member availability confirmed</li> <li><input checked="" type="checkbox"/> Relevant project references (last 5 years)</li> </ul>

*Scope of Services Compliance*

DeNovo	LZH	RSG
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> North County Fire Authority analysis</li> <li><input checked="" type="checkbox"/> Central County Fire Authority analysis</li> <li><input type="checkbox"/> Cost-benefit analysis of alternatives</li> <li><input checked="" type="checkbox"/> Funding recommendations</li> <li><input checked="" type="checkbox"/> Clear implementation plan</li> </ul> <p>Notes: The cost-benefit analysis assumes existing staffing. The analysis will not include staff changes based on possible reorgs.</p>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> North County Fire Authority analysis</li> <li><input checked="" type="checkbox"/> Central County Fire Authority analysis</li> <li><input type="checkbox"/> Cost-benefit analysis of alternatives</li> <li><input type="checkbox"/> Funding recommendations</li> <li><input checked="" type="checkbox"/> Clear implementation plan</li> </ul> <p>Notes: It's not clear how they would structure the review of the governance models with the financial forecasting</p>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> North County Fire Authority analysis</li> <li><input checked="" type="checkbox"/> Central County Fire Authority analysis</li> <li><input checked="" type="checkbox"/> Cost-benefit analysis of alternatives</li> <li><input checked="" type="checkbox"/> Funding recommendations</li> <li><input checked="" type="checkbox"/> Clear implementation plan</li> </ul>

*Service Evaluation Elements*

DeNovo	LZH	RSG
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Service levels assessment</li> <li><input checked="" type="checkbox"/> Operational structure analysis</li> <li><input checked="" type="checkbox"/> Comprehensive financial analysis</li> <li><input checked="" type="checkbox"/> Five-year financial forecast</li> <li><input checked="" type="checkbox"/> CKH Act determination compliance</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Service levels assessment</li> <li><input checked="" type="checkbox"/> Operational structure analysis</li> <li><input checked="" type="checkbox"/> Comprehensive financial analysis</li> <li><input checked="" type="checkbox"/> Five-year financial forecast</li> <li><input checked="" type="checkbox"/> CKH Act determination compliance</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Service levels assessment</li> <li><input checked="" type="checkbox"/> Operational structure analysis</li> <li><input checked="" type="checkbox"/> Comprehensive financial analysis</li> <li><input checked="" type="checkbox"/> Five-year financial forecast</li> <li><input checked="" type="checkbox"/> CKH Act determination compliance</li> </ul>

## Budget and Resources Comparison

Category	DeNovo	LZH	RSG
Alternative Governance Study Cost	\$93,260.00	\$39,150.00	\$80,310
Service Evaluation Cost	\$193,640.00	\$156,750.00	\$20,235
Additional Services	\$9,145.00	\$3,300.00	\$59,700
Total Proposed Budget	\$296,045.00	\$199,200.00	\$190,245

## Staffing Allocation

Role	DeNovo	LZH	RSG
Total Staff	6	3	6
Project Manager	Steve McMurtry	Linda Zambito Heckenkamp	Jim Simon
Lead Analyst	Unknown	Paula Graf	Carol Ieromnimon
Fire Service Expert	Dennis Bitters	Stephen Abbot	William Gillespie
Financial Analyst	Richard Berkson	Unknown	Unknown
Sub-Consultants	Dennis Bitters Richard Berkson	Stephen Abbot	Planwest Partners William Gillespie

## Timeline Comparison

Project Phase	DeNovo	LZH	RSG
Project Start	1/15/2025	Unknown	January 2024
Final Report Delivery	9/29/2026	Unknown	April 2025
Total Project Duration	21 months	14 months	16 months

## Detailed Evaluation Notes

### *DeNovo*

#### **Strengths:**

- Worked with JD before
- Dedicated financial consultant with fire service review experience
- Dedicated fire services expert from the region with extensive experience and historical knowledge

#### **Weaknesses:**

- Found a typo in the RFP - "De Novo Planning Group is not involved in any pending litigation which may affect our ability to provide services to the City as stated in this proposal."
- Lower level staff do not have fire service review experience.
- Example projects provided are not fire service specific.
- Over a year and a half process

**Overall Choice (First, Second, Third): Second**

*LZH*

**Strengths:**

- Dedicated fire services expert from San Diego (May have knowledge of successful reorg in San Diego County)
- Fewer lower level staff
- Anticipates 14 months completion

**Weaknesses:**

- Typo copy paste from the RFP.
- Based in Florida - does not explain how they would conduct agency interviews
- No dedicated financial consultant or analyst

**Overall Choice (First, Second, Third): Third**

*RSG*

**Strengths:**

- Proposes to include cities outside MSR scope in the five year forecast analysis
- Dedicated fire services expert
- Worked with JD in the past
- Tailored the proposal to emphasize the Alternative gov. Study with the MSR needs secondary

**Weaknesses:**

- Not locally based
- No dedicated financial consultant or analyst

**Overall Choice (First, Second, Third): First**