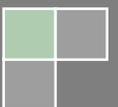


2017

MUNICIPAL SERVICE REVIEW
AND SPHERE OF INFLUENCE
STUDY

FOR THE

[insert]





Project Name: MSR/SOI for

LAFCo Project No.

Conducted By: [staff name, title]
Yolo Local Agency Formation Commission
625 Court Street, Suite 203
Woodland, CA 95695

Date:

Subject Agency:

Agency Address:

Agency Contact Person:

**Date of Last MSR/SOI
Adopted by LAFCo**

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MSR/SOI BACKGROUND

ROLE AND RESPONSIBILITY OF LAFCO

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000, as amended (“CKH Act”) (California Government Code §§56000 et seq.), is LAFCo’s governing law and outlines the requirements for preparing Municipal Service Reviews (MSRs) for periodic Sphere of Influence (SOI) updates. MSRs and SOIs are tools created to empower LAFCo to satisfy its legislative charge of “discouraging urban sprawl, preserving open-space and prime agricultural lands, efficiently providing government services, and encouraging the orderly formation and development of local agencies based upon local conditions and circumstances (§56301). CKH Act Section 56301 further establishes that “one of the objects of the commission is to make studies and to obtain and furnish information which will contribute to the logical and reasonable development of local agencies in each county and to shape the development of local agencies so as to advantageously provide for the present and future needs of each county and its communities.”

Based on that legislative charge, LAFCo serves as an arm of the State; preparing and reviewing studies and analyzing independent data to make informed, quasi-legislative decisions that guide the physical and

economic development of the state (including agricultural uses) and the efficient, cost-effective, and reliable delivery of services to residents, landowners, and businesses. While SOIs are required to be updated every five years, they are not time-bound as planning tools by the statute, but are meant to address the “probable physical boundaries and service area of a local agency” (§56076). SOIs therefore guide both the near-term and long-term physical and economic development of local agencies their broader county area, and MSRs provide the near-term and long-term time-relevant data to inform LAFCo’s SOI determinations.

PURPOSE OF A MUNICIPAL SERVICE REVIEW

As described above, MSRs are designed to equip LAFCo with relevant information and data necessary for the Commission to make informed decisions on SOIs. The CKH Act, however, gives LAFCo broad discretion in deciding how to conduct MSRs, including geographic focus, scope of study, and the identification of alternatives for improving the efficiency, cost-effectiveness, accountability, and reliability of public services. The purpose of a Municipal Services Review (MSR) in general is to provide a comprehensive inventory and analysis of the services provided by local municipalities, service areas, and special districts. A MSR evaluates the structure and operation of the local municipalities, service areas, and special districts and discusses possible areas for improvement and coordination. The MSR is intended to provide information and analysis to support a sphere of influence update. A written statement of the study’s determinations must be made in the following areas:

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; and
7. Any other matter related to effective or efficient service delivery, as required by commission policy.

The MSR is organized according to these determinations listed above. Information regarding each of the above issue areas is provided in this document.

PURPOSE OF A SPHERE OF INFLUENCE

In 1972, LAFCOs were given the power to establish SOIs for all local agencies under their jurisdiction. As defined by the CKH Act, “‘sphere of influence’ means a plan for the probable physical boundaries and service area of a local agency, as determined by the commission” (§56076). SOIs are designed to both proactively guide and respond to the need for the extension of infrastructure and delivery of municipal services to areas of emerging growth and development. Likewise, they are also designed to discourage urban sprawl and the premature conversion of agricultural and open space resources to urbanized uses.

The role of SOIs in guiding the State's growth and development was validated and strengthened in 2000 when the Legislature passed Assembly Bill ("AB") 2838 (Chapter 761, Statutes of 2000), which was the result of two years of labor by the Commission on Local Governance for the 21st Century, which traveled up and down the State taking testimony from a variety of local government stakeholders and assembled an extensive set of recommendations to the Legislature to strengthen the powers and tools of LAFcos to promote logical and orderly growth and development, and the efficient, cost-effective, and reliable delivery of public services to California's residents, businesses, landowners, and visitors. The requirement for LAFcos to conduct MSR's was established by AB 2838 as an acknowledgment of the importance of SOIs and recognition that regular periodic updates of SOIs should be conducted on a five-year basis (§56425(g)) with the benefit of better information and data through MSR's (§56430(a)).

Pursuant to Yolo County LAFCO policy an SOI includes an area adjacent to a jurisdiction where development might be reasonably expected to occur in the next 20 years. A MSR is conducted prior to, or in conjunction with, the update of a SOI and provides the foundation for updating it.

LAFCO is required to make five written determinations when establishing, amending, or updating an SOI for any local agency that address the following (§56425(c)):

1. The present and planned land uses in the area, including agricultural and open-space lands.
2. The present and probable need for public facilities and services in the area.
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.
4. The existence of any social or economic communities of interest in the area if the commission determines that they are relevant to the agency.
5. For an update of an SOI of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

DISADVANTAGED UNINCORPORATED COMMUNITIES

SB 244 (Chapter 513, Statutes of 2011) made changes to the CKH Act related to "disadvantaged unincorporated communities," including the addition of SOI determination #5 listed above. Disadvantaged unincorporated communities, or "DUCs," are inhabited territories (containing 12 or more registered voters) where the annual median household income is less than 80 percent of the statewide annual median household income.

On March 26, 2012, LAFCO adopted a "Policy for the Definition of 'Inhabited Territory' for the Implementation of SB 244 Regarding Disadvantaged Unincorporated Communities", which identified 21 inhabited unincorporated communities for purposes of implementing SB 244.

CKH Act Section 56375(a)(8)(A) prohibits LAFCO from approving a city annexation of more than 10 acres if a DUC is contiguous to the annexation territory but not included in the proposal, unless an application to annex the DUC has been filed with LAFCO. The legislative intent is to prohibit "cherry picking" by cities of tax-generating land uses while leaving out under-served, inhabited areas with infrastructure deficiencies and lack of access to reliable potable water and wastewater services. DUCs are recognized as social and economic communities of interest for purposes of recommending SOI determinations pursuant to Section 56425(c).

ORGANIZATION OF MSR/SOI STUDY

This report has been organized in a checklist format to focus the information and discussion on key issues that may be particularly relevant to the subject agency while providing required LAFCo's MSR and SOI determinations. The checklist questions are based on the Cortese-Knox-Hertzberg Act, the LAFCo MSR Guidelines prepared by the Governor's Office of Planning and Research and adopted Yolo LAFCo local policies and procedures. This report provides the following:

- Provides a description of the subject agency;
- Provides any new information since the last MSR and a determination regarding the need to update the SOI;
- Provides MSR and SOI draft determinations for public and Commission review; and
- Identifies any other issues that the Commission should consider in the MSR/SOI.

AGENCY PROFILE

Describe the agency, its location, history, number of employees, structure, services it provides, etc.. Use points and reference roads, (for example ... north of the City of Davis between CR 27 and CR 31....). Include a map of the existing agency boundary (including SOI boundary)

[Insert Figure 1 – Location Map]

AFFECTED AGENCIES

Per Government Code Section 56427, a public hearing is required to adopt, amend, or revise a sphere of influence. Notice shall be provided at least 21 days in advance and mailed notice shall be provided to each affected local agency or affected County, and to any interested party who has filed a written request for notice with the executive officer. Per Government Code Section 56014, an affected local agency means any local agency that overlaps with any portion of the subject agency boundary or SOI (included proposed changes to the SOI).

The affected local agencies for this MSR/SOI are:

County/Cities:

- City of Davis
- City of West Sacramento
- City of Winters
- City of Woodland
- County of Yolo

County Service Areas (CSAs)

- Dunnigan, El Macero, Garcia Bend, North Davis Meadows, Snowball, Wild Wings, and Willowbank

K-12 School Districts:

- Davis Joint Unified
- Esparto Unified

Community College Districts:

- Delta
- Los Rios

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- | | | | |
|--------------------------|------------------------|--------------------------|--------|
| <input type="checkbox"/> | Pierce Joint Unified | <input type="checkbox"/> | Solano |
| <input type="checkbox"/> | River Delta Unified | <input type="checkbox"/> | Yuba |
| <input type="checkbox"/> | Washington Unified | | |
| <input type="checkbox"/> | Winters Joint Unified | | |
| <input type="checkbox"/> | Woodland Joint Unified | | |

Special Districts:

- Cemetery District – Capay, Cottonwood, Davis, Knight's Landing, Mary's, Winters
- Community Service District – Cacheville, Esparto, Knight's Landing, Madison
- Fire Protection District – Capay, Clarksburg, Dunnigan, East Davis, Elkhorn, Esparto, Knights Landing, Madison, No Man's Land, Springlake, West Plainfield, Willow Oak, Winters, Yolo, Zamora
- Sacramento-Yolo Port District
- Reclamation District – 150, 307, 537, 730, 765, 785, 787, 827, 900, 999, 1600, 2035, 2076, 2120
- Yolo County Resource Conservation District
- Water District – Dunnigan, Knight's Landing Ridge Drainage, Yolo County Flood Control & Water Conservation

Multi-County Districts:

- Reclamation District – 108 (Colusa), 2068 (Solano), 2093 (Solano)
- Water District – Colusa Basin Drainage
- Sacramento-Yolo Mosquito and Vector Control District

MUNICIPAL SERVICE REVIEW

POTENTIALLY SIGNIFICANT MSR DETERMINATIONS

The MSR determinations checked below are potentially significant, as indicated by “yes” or “maybe” answers to the key policy questions in the checklist and corresponding discussion on the following pages. If most or all of the determinations are not significant, as indicated by “no” answers, the Commission may find that a MSR update is not warranted.

- | | |
|--|--|
| <input type="checkbox"/> Growth and Population | <input type="checkbox"/> Shared Services |
| <input type="checkbox"/> Disadvantaged Unincorporated Communities | <input type="checkbox"/> Accountability |
| <input type="checkbox"/> Capacity, Adequacy & Infrastructure to Provide Services | <input type="checkbox"/> Other |
| <input type="checkbox"/> Financial Ability | |

LAFCO MUNICIPAL SERVICE REVIEW:

- On the basis of this initial evaluation, the required determinations are not significant and staff recommends that an MSR is NOT NECESSARY. The subject agency will be reviewed again in five years per Government Code Section 56425(g).
- The subject agency has potentially significant determinations and staff recommends that a comprehensive MSR IS NECESSARY and has been conducted via this checklist.

1. GROWTH AND POPULATION			
Growth and population projections for the affected area.	YES	MAYBE	NO
a) Is the agency's territory or surrounding area expected to experience any significant population change or development over the next 5-10 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Will development have an impact on the subject agency's service needs and demands?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Will projected growth require a change in the agency's service and/or sphere of influence boundary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

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a) Describe the current and projected population.

Describe any reasonably foreseeable development projects in the territory or surrounding area over the next 5-10 years.

b)

c)

Growth and Population MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED REFERENCES:

- U.S. Census Bureau- American Fact Finder- *Current Population*
<http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>
- U.S Department of Finance- Population Projections
<http://www.dof.ca.gov/research/demographic/reports/view.php#objCollapsiblePanelProjectionsAnchor>
- City and/or County General Plans
- City and/or County planning departments

2. DISADVANTAGED UNINCORPORATED COMMUNITIES

The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.

	YES	MAYBE	NO
a) Does the subject agency provide public services related to sewers, municipal and industrial water, or structural fire protection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) If yes, are there any "inhabited unincorporated communities" (per adopted Commission policy) within or adjacent to the subject agency's sphere of influence that are considered "disadvantaged" (80% or less of the statewide median household income) that do not already have access to public water, sewer and structural fire protection (if no to a), this question may be skipped)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) If "yes" to both a) and b), it is feasible for the agency to be reorganized such that it can extend service to the disadvantaged unincorporated community (if "no" to either a) or b), this question may be skipped)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

- a) Please see agency profile. A “yes” response indicates that the agency provides a service that may trigger the provisions of SB 244 and a LAFCo determination regarding any disadvantaged unincorporated communities within or adjacent to the agency’s sphere of influence is required. A “no” response indicates that the provisions of SB 244 would not apply to a SOI update, if applicable.
- b) The term “Inhabited Unincorporated Communities” is defined per Commission adopted policy as those areas on the County of Yolo 2030 General Plan Land Use Map (see Figures LU-1B through LU-1H) that contain land use designations that are categorized as Residential by Table LU-6. The communities of Rumsey and West Kentucky are also included in this definition (even though the current land use designations are Agriculture (AG) and Commercial Local (CL) respectively) because their existing uses are residential. These communities are as follows:

Binning Farms	Guinda	Rumsey
Capay	Knights Landing	West Kentucky
Clarksburg	Madison	West Plainfield
Dunnigan	Monument Hills	Willow Oak
El Macero	North Davis Meadows	Willowbank
El Rio Villa	Patwin Road	Yolo
Esparto	Royal Oak	Zamora

If any of the above listed communities are located within the agency’s territory or surrounding area:

- Describe the current statewide median household income. Define what 80% of that would be, in order to determine the median household income threshold for being defined as a disadvantaged unincorporated community.
- Provide median household income data on the inhabited unincorporated community, If applicable, and determine if they are considered “disadvantaged unincorporated communities” according to SB 244.
- Describe the location and characteristics of the DUC.

If none of these communities are located within or surrounding the agency’s territory, just say so and income information is not needed.

- c) Is there any way to extend services to the DUC? Is it feasible?

Disadvantaged Unincorporated Communities MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED REFERENCES:

- U.S. Census Bureau- Median Household Incomes
<http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

3. CAPACITY AND ADEQUACY OF PUBLIC FACILITIES AND SERVICES

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.

	YES	MAYBE	NO
a) Are there any deficiencies in agency capacity to meet service needs of existing development within its existing territory (also note number of staff and/or contracts that provide services)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any issues regarding the agency's capacity to meet the service demand of reasonably foreseeable future growth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Are there any concerns regarding public services provided by the agency being considered adequate (i.e. is there a plan for additional staff or expertise if necessary)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Are there any significant infrastructure needs or deficiencies to be addressed for which the agency has not yet appropriately planned (including deficiencies created by new state regulations)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) If the agency provides water, wastewater or fire protection services, is the agency considering climate adaptation in its assessment of infrastructure/service needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Are there any service needs or deficiencies for disadvantaged unincorporated communities related to sewers, municipal and industrial water, and structural fire protection within or contiguous to the agency's sphere of influence?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)

Capacity and Adequacy of Public Facilities and Services MSR Determination

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Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For “NO” responses: Be brief but clearly demonstrate why the answer is no.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

Responses may require discussion of the following issues:

- Describe the organization’s service delivery system, including any infrastructure or facilities.
- Discuss any complaints filed by community members or neighboring organizations.
- Discuss any compliance issues with State regulations.
- Describe the potential for future population growth or development, and discuss the organization’s ability to meet the expanding service delivery demands that will accompany that growth. In particular, consider infrastructure or staffing expansions that will be required to meet the additional demand for services.
- Describe both near-term and long-term infrastructure needs and deficiencies.
- Discuss the organization’s plan for dealing with upcoming infrastructure needs and deficiencies.
- If the agency provides sewer, municipal and industrial water, or structural fire protection services, describe any disadvantaged unincorporated communities within or contiguous to the organization’s sphere of influence. Describe the level and adequacy of services that these communities are receiving and identify any service deficiencies that should be addressed.

SUGGESTED REFERENCES:

- Yolo County General Plan
<http://www.yolocounty.org/Index.aspx?page=1514>
- Agency General Plan, Facility Master Plan or Capital Improvement Plan

4. FINANCIAL ABILITY

Financial ability of agencies to provide services.

	YES	MAYBE	NO
a) Does the organization engage in budgeting practices that may indicate poor financial management, such as overspending its revenues, using up its fund balance or reserve over time, or adopting its budget late?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Is there an issue with the organization’s revenue sources being reliable? For example, is a large percentage of revenue coming from grants or one-time/short-term sources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Is the organization’s rate/fee schedule insufficient to fund an adequate level of service, and/or is the fee inconsistent with the schedules of similar service organizations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Is the organization unable to fund necessary infrastructure maintenance, replacement and/or any needed expansion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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e) Is the organization needing additional reserve to protect against unexpected events or upcoming significant costs?

f) Does the agency have any debt, and if so, is the organization's debt at an unmanageable level?

g) Does the agency have pension and/or other post-employment benefit (OPEB) liability? If so, what is it the liability and are there any concerns that it is unmanageable?

h) Is the organization in need of written financial policies that ensure its continued financial accountability and stability?

Discussion:

a) **Budget:**

Describe the organization's budget cycle, who is responsible for approving the organization's budget, and whether budgets are passed regularly and on-time.

Discuss whether the organization has regular independent audits.

Describe the organization's major expenditure categories (Include a 5-year trend chart).

Discuss how the expenditures have changes since the previous MSR/SOI.

Discuss any opportunities to reduce expenditures.

Describe the organization's major revenue sources (Include a 5-year trend chart).

Describe any grants or donations the organization has received since the previous MSR/SOI.

Discuss how revenues have changed since the previous MSR/SOI.

Discuss the stability of the revenue sources.

Discuss any opportunities to increase revenues.

Describe the organization's "revenues less expenditures" and end of year fund balances (Include a 5-year trend chart).

b) **Reserves:**

Describe the organization's reserve and contingency fund balances (Include a 5-year trend chart).

Describe the organization's reserve and/or contingency fund policies.

Discuss whether the organization regularly contributes to the reserve, and if so, how much.

Discuss whether the organization has used its reserve or contingency fund recently.

Discuss whether the organization's level of reserve is adequate to protect against unexpected events or upcoming significant costs.

c) **Rate/Fee Schedule:**

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Describe the organization's rate/fee schedule.

Discuss when the rate/fee schedule was adopted, and describe any recent efforts to alter the rate/fees schedule.

Compare the organization's rate/fee schedule to other organization's providing similar services in the region.

Describe the relationship between the rate/fee structure and level of service.

d) **Infrastructure Maintenance and Replacement:**

Describe the organization's capital improvement plan and/or infrastructure maintenance and replacement schedule.

Discuss whether the organization is on track with the timeline outlined in its infrastructure plan.

Discuss the organization's plans for funding upcoming maintenance and replacements.

e) Reserve:

f) **Debt:**

Describe any debt that the organization is currently repaying, including the total original amount and remaining balance, type of debt, interest rate, use of debt, and payment schedule.

Describe any debt that has been paid off by the organization since the most recent MSR/SOI.

Discuss any debt the organization expects to incur in the near future.

Describe the organization's debt management policy.

g) **Pension/OPEB:**

h) **Financial Policies:**

Describe the organization's financial policies.

Discuss whether the policies are in keeping with best practices.

Discuss when the policies were adopted, and if they are appropriately updated.

Financial Ability MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For "NO" responses: Be brief but clearly demonstrate why the answer is no, cite sources, etc.

For "YES" or "MAYBE" responses: Discuss the reasoning for your response in detail.

SUGGESTED RESOURCES:

- Budget Reports/Financial Statements
- Independent Audits/ Comprehensive Annual Financial Report (CAFR)

- Grant Donation History
- Rate/Fee Schedule
- California State Controller’s Office- Special District Annual Financial Reports
 - Reports include revenues, expenditures, and long-term debt information for every California special district
http://www.sco.ca.gov/ard_locarep_districts.html
- Government Finance Officers Association- Best Practices
http://www.gfoa.org/index.php?option=com_content&task=view&id=118&Itemid=130

5. SHARED SERVICES AND FACILITIES

Status of, and opportunities for, shared facilities.

	YES	MAYBE	NO
a) Are there any opportunities for the organization to share services or facilities with neighboring or overlapping organizations that are not currently being utilized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any recommendations to improve staffing efficiencies or other operational efficiencies to reduce costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)

Shared Services MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For “NO” responses: Be brief but clearly demonstrate why the answer is no.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

Responses may require discussion of the following issues:

- Describe organizations within proximity to the organization that offer similar services.
- Discuss shared services or use of facilities that are currently being implemented.
- Discuss opportunities for shared services or facilities that are not currently being utilized.
- Discuss what actions would be required to implement those opportunities and the potential benefit of such efficiencies.

SUGGESTED RESOURCES:

- Agency interviews
- Review of any service agreements, i.e. MOUs or JPAs...

6. ACCOUNTABILITY, STRUCTURE AND EFFICIENCIES

Accountability for community service needs, including governmental structure and operational efficiencies.

	YES	MAYBE	NO
a) Are there any issues with meetings being accessible and well publicized? Any failures to comply with disclosure laws and the Brown Act?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any issues with filling board vacancies and maintaining board members? Is there a lack of board member training regarding the organization's program requirements and financial management?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Are there any issues with staff turnover or operational efficiencies? Is there a lack of staff member training regarding the organization's program requirements and financial management?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Are there any issues with independent audits being performed on a regular schedule? Are completed audits being provided to the State Controller's Office within 12 months of the end of the fiscal year(s) under examination? Are there any corrective action plans to follow up on?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Does the organization need to improve its public transparency via a website? [A website should contain at a minimum the following information: organization mission/description/boundary, board members, staff, meeting schedule/agendas/minutes, budget, revenue sources including fees for services (if applicable), and audit reports]?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Are there any recommended changes to the organization's governance structure that will increase accountability and efficiency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Are there any opportunities to eliminate overlapping boundaries that confuse the public, cause service inefficiencies, unnecessarily increase the cost of infrastructure, exacerbate rate issues and/or undermine good planning practices?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)

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- f)
- g)

Accountability, Structure and Efficiencies MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For “NO” responses: Be brief but clearly demonstrate why the answer is no.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

Responses may require discussion of the following issues:

- Describe the organizations governance structure and meeting schedule.
- Describe efforts the organization has made to ensure accountability including, regularity of governance meetings, compliance with the Brown Act, and public outreach efforts.
- Describe the organizations staffing level and service delivery system.
- Describe how the organization processes complaints or service delivery issues.
- Describe any potential opportunities for consolidation with neighboring organizations that might increase accountability or efficiency.

SUGGESTED RESOURCES:

- Organization’s website
- Agency Interviews
- Customer feedback

7. OTHER ISSUES

Any other matter related to effective or efficient service delivery, as required by commission policy.

	YES	MAYBE	NO
a) Are there any other service delivery issues that can be resolved by the MSR/SOI process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

- a) Describe the additional issue.
Discuss opportunities for resolution

Other Issues MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED RESOURCES:

- Organization’s website

- Agency interviews or discussion with Supervisorial District staff.

SPHERE OF INFLUENCE STUDY

On the basis of the Municipal Service Review:

- Staff has reviewed the agency's Sphere of Influence and recommends that a SOI Update is NOT NECESSARY in accordance with Government Code Section 56425(g). Therefore, NO CHANGE to the agency's SOI is recommended and SOI determinations HAVE NOT been made.
- Staff has reviewed the agency's Sphere of Influence and recommends that a SOI Update IS NECESSARY in accordance with Government Code Section 56425(g). Therefore, A CHANGE to the agency's SOI is recommended and SOI determinations HAVE been made and are included in this MSR/SOI study.

SPHERE OF INFLUENCE MAP(S)

Insert Figure(s) of existing SOI (and proposed SOI if applicable)

POTENTIALLY SIGNIFICANT SOI DETERMINATIONS

If no SOI is recommended, the following determinations sections should be deleted from the study.

The SOI determinations below are potentially significant, as indicated by "yes" or "maybe" answers to the key policy questions in the checklist and corresponding discussion on the following pages.

- Present and Planned Land Uses
- Need for Public Facilities and Services
- Capacity and Adequacy of Provide Services
- Social or Economic Communities of Interest
- Disadvantaged Unincorporated Communities

1. PRESENT AND PLANNED LAND USES

The present and planned land uses in the area, including agricultural and open-space lands.

	YES	MAYBE	NO
a) Are there any present or planned land uses in the area that would create the need for an expanded service area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Would the SOI conflict with planned, orderly and efficient patterns of urban development?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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c) Is there a conflict with the adopted SACOG Metropolitan Transportation Plan/Sustainable Communities Strategy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Would the SOI result in the loss of prime agricultural land or open space?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Would the SOI impact the identity of any existing communities; e.g. would it conflict with existing postal zones, school, library, sewer, water census, fire, parks and recreation boundaries?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Are there any natural or made-made obstructions that would impact where services can reasonably be extended or should otherwise be used as a logical SOI boundary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Would the proposed SOI conflict with a Census boundary, such that it would compromise the ability to obtain discrete data?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)
- g)

Present and Planned Land Uses SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

2. NEED FOR PUBLIC FACILITIES AND SERVICES

The present and probable need for public facilities and services in the area.

	YES	MAYBE	NO
a) Would the SOI conflict with the Commission's goal to increase efficiency and conservation of resources by providing essential services within a framework of controlled growth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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b) Would the SOI expand services that could be better provided by a city or another agency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Does the SOI represent premature inducement of growth or facilitate conversion of agriculture or open space lands?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Does the SOI conflict with the Regional Housing Needs Analysis (RHNA) or other SACOG growth projections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Are there any areas that should be removed from the SOI because existing circumstances make development unlikely, there is not sufficient demand to support it or important open space/prime agricultural land should be removed from urbanization?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Have any agency commitments been predicated on expanding the agency's SOI such as roadway projects, shopping centers, educational facilities, economic development or acquisition of parks and open space?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)

Need for Public Facilities and Services SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED RESOURCES:

- SAGOC SCS land use map
- County General Plan
- Agency Capital Improvement Plans

3. CAPACITY AND ADEQUACY OF PROVIDED SERVICES

The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.

	YES	MAYBE	NO
a) Are there any issues regarding the agency's capacity to provide services in the proposed SOI territory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any issues regarding the agency's willingness and ability to extend services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)

Capacity and Adequacy of Provided Services SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

4. SOCIAL OR ECONOMIC COMMUNITIES OF INTEREST

The existence of any social or economic communities of interest in the area if the commission determines that they are relevant to the agency.

	YES	MAYBE	NO
a) Are there any "inhabited unincorporated communities" (per adopted Commission policy) within or adjacent to the subject agency's sphere of influence that are considered "disadvantaged" (same as MSR checklist question 2b)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

- a) Please see response to MSR checklist question 2b.

Social or Economic Communities of Interest SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

5. DISADVANTAGED UNINCORPORATED COMMUNITIES

For an update of an SOI of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

	YES	MAYBE	NO
a) Does the subject agency provide public services related to sewers, municipal and industrial water or structural fire protection (same as MSR checklist question 2a)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) If yes, does the proposed SOI exclude any disadvantaged unincorporated community (per MSR checklist question 2b) where it either may be feasible to extend services or it is required under SB 244 to be included?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

- a) Please see response to MSR checklist question 2a.
- b)

Disadvantaged Unincorporated Communities SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

REFERENCES

ATTACHMENTS