San Diego County
Local Agency Formation Commission
Regional Service Planning | Subdivision of the State of California

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AGENDA REPORT
Business | Action

November 6, 2023

TO: Commissioners

FROM: Keene Simonds, Executive Officer
Carolanne Ieromnimon, Analyst II

SUBJECT: **Proposed Update to the Study Schedule**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider approving a proposed update to its five-year Study Schedule. The current schedule covers 2022 to 2026 and guides the Commission's task in statute to regularly prepare municipal service reviews to help inform other regulatory and planning duties. The proposed update has been initiated by staff to reset the anticipated timing of studies (subject to the annual workplan) to reflect current progress and provide a more accurate projection of start dates going forward over the next five years. It also – pertinently – transitions from a fixed to a rolling schedule where only the first year listing is set while the remaining four years' listings are tentative. The Commission would proceed to reset the Study Schedule and its five-year coverage each year in concert with adopting an annual budget and workplan.

BACKGROUND

Study Directive | Municipal Service Reviews and Sphere of Influence Updates

State law directs San Diego LAFCO to review all local agencies' spheres of influence and update as needed every five years and in doing so actively manage what the Commission sets as the agencies' appropriate current and future boundaries and service areas. State law relatedly specifies LAFCO inform sphere updates by preparing municipal service reviews to

Administration
Keene Simonds, Executive Officer
2550 Fifth Avenue, Suite 725
San Diego, California 92103
T 619.321.3380
www.sdlafco.org
lafco@sdcounty.ca.gov

Chair Jim Desmond, County of San Diego
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independently assess the availability and adequacy of local services relative to community needs. The Commission's policies on preparing municipal service reviews are codified as L-106 and includes direction to maintain a five-year study schedule.

Current Study Schedule

San Diego LAFCO approved its current Study Schedule calendaring municipal service reviews and ancillary sphere of influence updates in June 2022. The current Study Schedule calendars between five and six municipal service reviews each year over a fixed five-year period ending in 2025-2026. Other key characteristics include an overall emphasis on preparing regional or service specific municipal service reviews. A copy of the current Study Schedule is attached.

Study Schedule Status

San Diego LAFCO has completed three of the ten municipal service reviews calendared for the first two years of the current five-year Study Schedule. The three involve regional studies on Escondido, Ramona, and Fallbrook-Rainbow. Another six are underway consistent with the adopted workplan with four expected to be completed this fiscal year and involve regional studies on Carlsbad, Oceanside, Vista, and San Marcos. The remaining two are expected to be complete next fiscal and involve regional studies on Del Mar and Encinitas. The 11th municipal service review involves the Pauma Valley region and is not in the adopted workplan.[1] A status summary of the current Study Schedule is shown in the following table.

Current Study Schedule Status
Municipal Service Reviews Calendared for FY2022 and FY2023

Municipal Service Review	Status
Escondido Region – Part II	Completed
Fallbrook-Rainbow Region	Completed
Ramona Region	Completed
Carlsbad Region	Underway – FY23
Oceanside Region	Underway – FY23
San Marcos Region	Underway – FY23
Vista Region	Underway – FY23
Del Mar – Solana Beach Region	Underway – FY24 (expected)
Encinitas Region	Underway – FY24 (expected)
Paula Valley Region	Pending Future Workplan

DISCUSSION

This item is for San Diego LAFCO to consider approving a proposed update to the five-year Study Schedule calendaring municipal service reviews, and by extension sphere of influence updates. The proposed update has been initiated by staff and would make changes to both timing and structure and headlined by the following new characteristics.

1 A governance study on the Escondido region was also included in the Study Schedule and initially added to the FY2023 workplan. The Commission – however – did not include the governance study in the FY2024 workplan.

- The proposed update resets the five-year period starting in FY2024. The five-year coverage period resets (rolls) each year thereafter subject to Commission approval.

- All municipal service reviews previously calendared by the Commission in the current Study Scheduled are incorporated into the proposed update.

- The first year of the proposed update in FY2024 is set and includes the eight municipal service reviews authorized by the Commission in the current adopted workplan:

  - Wholesale Water Services
  - San Diego County Healthcare Districts
  - Carlsbad Region
  - Oceanside Region
  - Vista Region
  - San Marcos Region
  - Del Mar + Solana Beach Region
  - Encinitas Region

- The second year of the proposed update (FY2025) is light in volume with the expectation some of the first year municipal service reviews will need to continue. A likely example involves the municipal service review on wholesale water services (County Water Authority and Metropolitan Water District).

- The second to fifth years of the proposed update are tentatively calendared and done so to help guide and telegraph future decision-making (i.e., adopt future workplans and reset future study schedules). The municipal service reviews will remain in tentative status until added to the first year and concurrently placed in the workplan.

ANALYSIS

The proposed update to the Study Schedule before San Diego LAFCO serves as a midcourse correction and resets the five-year calendar in preparing municipal service reviews and any related sphere of influence updates to reflect current timing expectations. It also – pertinently – introduces a structural change to transition the Study Schedule from a fixed to rolling five-year schedule. This transition positions the Commission to sync the Study Schedule more readily with the adopted annual workplan and the real-time accounting therein for resources and priorities that can – and have – lengthened and/or delayed studies. Apt examples where the Commission would benefit from a rolling schedule include redirecting staff resources to address high-volume or complex applicant proposals as well as advancing studies out-of-order given unique timing interests that otherwise are collectively unknown to LAFCO at the time of setting a fixed schedule.

RECOMMENDATION

It is recommended San Diego LAFCO approve the proposed update to the Study Schedule and in doing so replace the current version from June 2022. This recommendation would be accommodated by taking the actions outlined in the proceeding section as Alternative One.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO:

Alternative One (recommended):
Approve the proposed update to the Study Schedule provided as Attachment Two with any desired changes with an immediate effective date.

Alternative Two:
Continue consideration of the item to a future meeting and provide direction to staff for more information and/or outreach as needed.

Alternate Three:
Take no action.

PROCEDURES

This item has been placed on the agenda for action as part of San Diego LAFCO's business calendar. The following procedures, accordingly, are recommended.

1) Receive verbal report from staff unless waived.
2) Commission discussion.
3) Consider the staff recommendation.

On behalf of the Executive Officer



Carolanne Ieromnimon
Analyst II

Attachments:

1) Current Five-Year Study Schedule: FY2022 to FY2026
2) Proposed Update to Five-Year Study Schedule Beginning with FY2024

Commission Study Schedule

FY2022 THROUGH FY2026

Regional Service Planning
Subdivision of the State of California



Study Directive

State law directs San Diego LAFCO to review spheres of influence for all cities and special districts and update as needed (affirm, expand, reduce, etc.) every five years and by extension mark the agencies' appropriate current and future boundaries and service areas. Pertinently, local agencies cannot annex and/or extend services outside their spheres with limited exceptions. State law also specifies San Diego LAFCO must inform the sphere updates by preparing comprehensive evaluations – titled municipal service reviews – to determine the availability and adequacy of local governmental services as well as governance responsiveness relative to community needs.

Study Schedule

San Diego LAFCO has established a five-year Study Schedule to guide its statutory task to review and update as appropriate the spheres of influence of cities and special districts under the Commission's oversight. The Study Schedule is premised on the Commission's policy interest to proactively calendar municipal service reviews and use these documents to determine the subsequent scope of any related sphere of influence updates for the affected agencies.

Commission Discretion

The Study Schedule serves as a general guide in preparing municipal service reviews and related sphere of influence updates; it does not commit the Commission to any particular approach or scale in preparing these reports. The Commission must also coordinate the initiate of any scheduled municipal service review in conjunction with adopting an annual workplan to ensure appropriate resources are available to proceed relative to other activities and priorities.

SEE THE SCHEDULE »

2021 – 2022 & 2022 – 2023

NORTH COUNTY FOCUS

Escondido Region: Part II
- City of Escondido

Fallbrook–Rainbow Region
- Fallbrook PUD
- Rainbow MWD
- North County FPD
- CSA No. 81 – Fallbrook Parks

Pauma Valley Region
- Mootamai MWD
- Rincon Ranch CSD
- Pauma CSD
- Pauma MWD
- San Luis Rey MWD
- Yuima MWD

Ramona Region
- Ramona MWD

San Marcos Region
- City of San Marcos
- Buena SD*
- San Marcos FPD
- Vallecitos WD
- Vista ID*

Vista Region
- City of Vista
- Vista ID*
- Vista FPD
- Buena SD*

NORTH COAST FOCUS

Carlsbad Region
- City of Carlsbad
- Carlsbad MWD
- Leucadia WD *

Escondido Region: Governance Option
- City of Escondido
- Rincon del Diablo MWD

Del Mar – Solana Beach Region
- City of Del Mar
- City of Solana Beach
- Santa Fe ID
- CSA No. 17 – Ambulance *

Encinitas Region
- City of Encinitas
- Leucadia WWD *
- Olivenhain MWD
- San Dieguito WD
- CSA 17 – Ambulance*

Oceanside Region
- City of Oceanside
- Morreo Hills CSD
- Oceanside Harbor District

*Denotes a special district included in more than one study.



Oceanside California State Beach ▶



Chula Vista is the second largest city in the San Diego metropolitan area.

2023 – 2024

SOUTHWEST COUNTY FOCUS

Macro Fire Service Study

- State: CAL FIRE
- Cities
- Special Districts
- Tribes

Metro San Diego Region

- City of San Diego
- San Diego Unified PD

Rancho Santa Fe Region

- Fairbanks Ranch CSD
- Questhaven MWD
- Rancho Santa Fe CSD
- Rancho Santa Fe FPD
- Whispering Palms CSD
- CSA No. 17 – Ambulance*
- CSA No. 83 – San Dieguito Parks

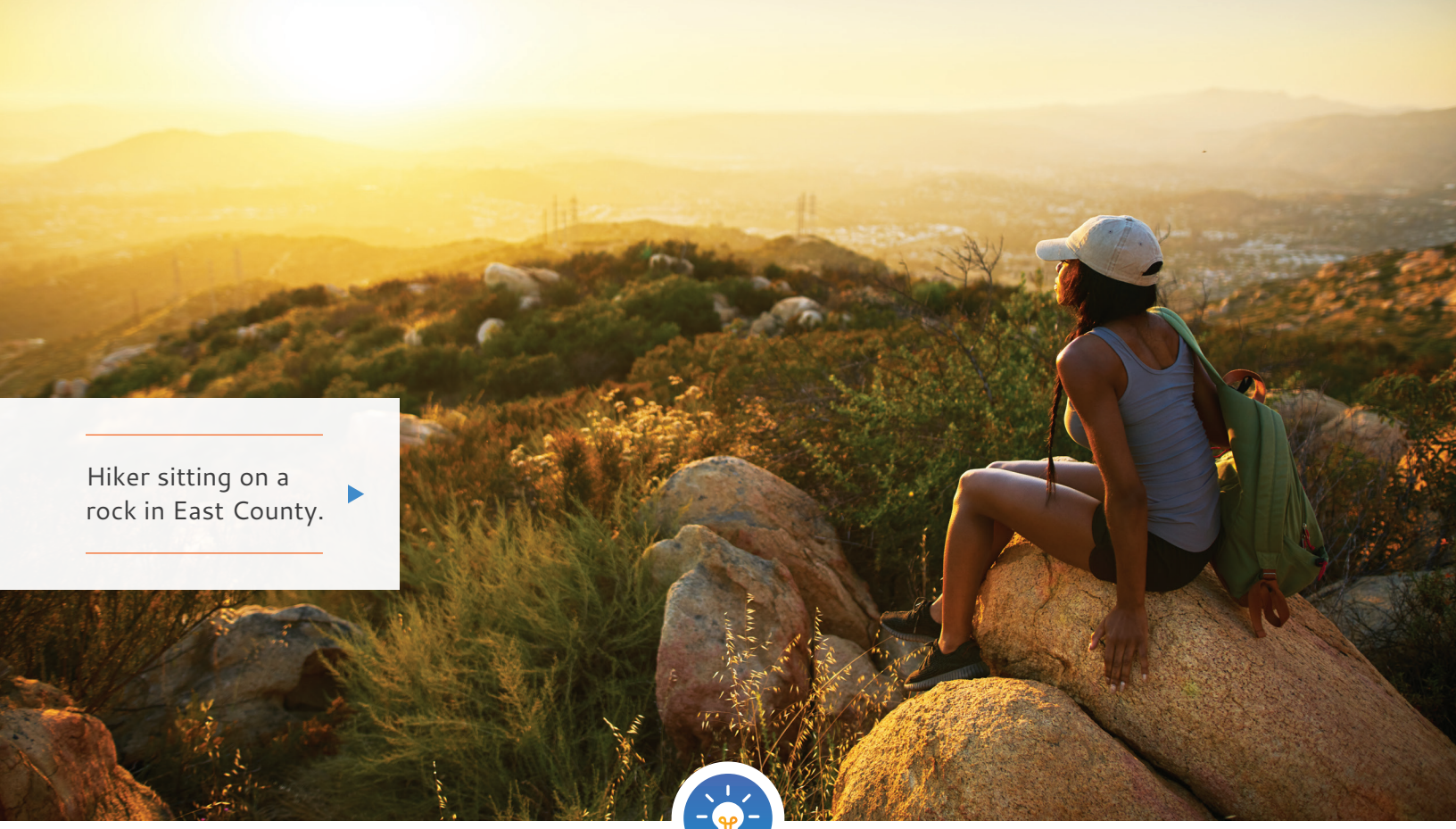
Silver Strand Region

- City of Coronado
- City of Imperial Beach

South Coast Region

- City of Chula Vista
- City of National City
- Bonita-Sunnyside FPD
- Lower Sweetwater FPD
- Otay WD*
- San Diego County SD*
- South Bay ID
- CSA No. 122 – Planning

*Denotes a special district included in more than one study.



Hiker sitting on a rock in East County.

2024 – 2025

EAST COUNTY FOCUS

Alpine – Lakeside Region

- Alpine FPD
- Lakeside FPD
- Lakeside WD
- Padre Dam MWD*
- San Diego County SD*
- CSA No. 69 – Ambulance
- CSA No. 136 – Sundance Basin

El Cajon – Santee Region

- City of El Cajon
- City of Santee
- Helix WD*
- Padre Dam MWD*

East Laguna Summit Region

- Canebrake WD
- Descanso WD
- Jacumba CSD
- San Diego County SD*
- CSA No. 137 – Live Oak Springs

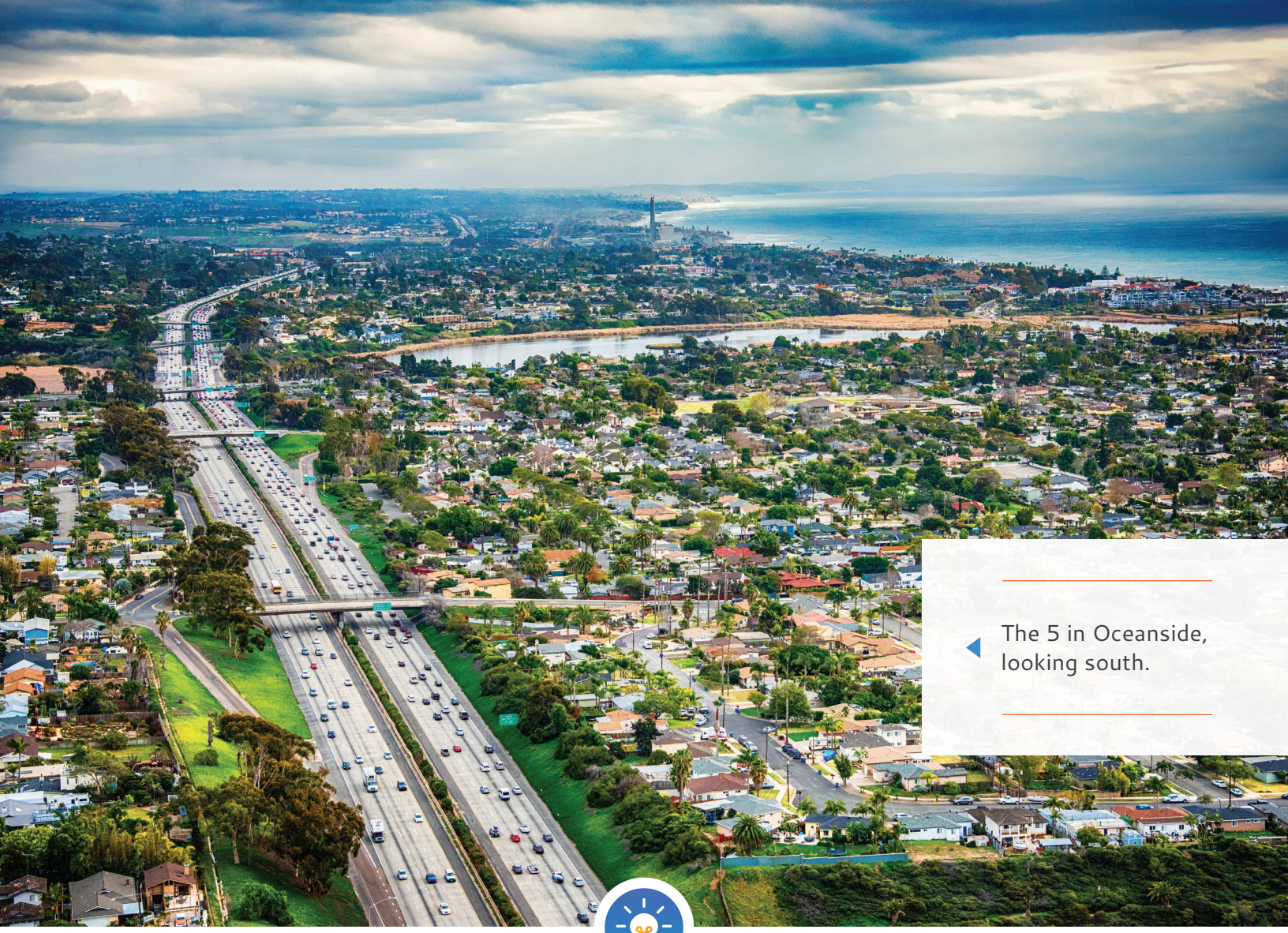
La Mesa – Lemon Grove Region

- City of La Mesa
- City of Lemon Grove
- Helix WD*
- Lemon Grove Roadway LD
- Lemon Grove SD
- San Diego County SD*

Spring Valley Region

- Otay MWD*
- San Miguel FPD
- San Diego County SD*
- CSA No. 69 – Ambulance*
- CSA No. 128 – Parks

*Denotes a special district included in more than one study.



The 5 in Oceanside, looking south.

2025 – 2026

MISCELLANEOUS

Borrego Region

- Borrego Springs FPD
- Borrego WD
- Coachella Valley WD

Cemetery Services

- North County CD
- Pomerado CD
- Ramona CD
- Valley Center CD

Flood Control Services

- San Diego County FCD
- Cities
- Special Districts

Healthcare Services

- Fallbrook HD
- Palomar Health HD
- Tri-City HD
- Grossmont HD

Transit Services

- North County TD

Wholesale Water Services

- County Water Authority
- Metropolitan WD

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Commission Study Schedule 5-Year Plan

FY2024 THROUGH FY2028

Regional Service Planning
Subdivision of the State of California



Study Directive

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Study Schedule

San Diego LAFCO has established a five-year rolling Study Schedule to guide its statutory task to review and update as appropriate the spheres of influence of cities and special districts under the Commission's oversight. The rolling Study Schedule is premised on the Commission's policy interest to proactively calendar municipal service reviews and use these documents to determine the subsequent scope of any related sphere of influence updates for the affected agencies. The Commission also regularly draws on the municipal service reviews to inform its' decision-making on boundary changes.

Rolling Study Schedule Format

The Study Schedule is a living or rolling document that the Commission resets yearly in concert with the annual budget and workplan adoptions. The rolling study schedule spans 5 fiscal years with only the first year being set. The second through fifth years are tentatively calendared, and done so to help guide and telegraph future decision-making. This approach allows the Commission the flexibility to redirect staff resources where needed should calendar studies extend beyond one year while also granting staff the ability to prioritize applicant proposals.

SEE THE SCHEDULE »

2023-2024

NORTH COUNTY FOCUS

Carlsbad Region

- City of Carlsbad
- Carlsbad MWD
- Leucadia WD

Vista Region

- City of San Marcos
- Buena SD*
- San Marcos FPD
- Vallecitos WD
- Vista ID*

San Marcos Region

- City of Vista
- Vista ID*
- Vista FPD
- Buena SD*

Healthcare Districts

- Fallbrook HCD
- Grossmont HCD
- Palomar HCD
- Tri-City HCD

Del Mar – Solana Beach Region

- City of Del Mar
- City of Solana Beach
- Santa Fe ID
- CSA No. 17 – Ambulance *

Encinitas Region

- City of Encinitas
- Leucadia WWD *
- Olivenhain MWD
- San Dieguito WD
- CSA 17 – Ambulance*

Oceanside Region

- City of Oceanside
- Morreo Hills CSD
- Oceanside Harbor District

Wholesale Water Services

- San Diego County Water Authority
- Metropolitan Water District

*Denotes a special district included in more than one study.



Oceanside California State Beach ▶



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2025 – 2026

SOUTHWEST COUNTY FOCUS

Macro Fire Service Study

- State: CAL FIRE
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- Special Districts
- Tribes

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- City of San Diego
- San Diego Unified PD

Rancho Santa Fe Region

- Fairbanks Ranch CSD
- Questhaven MWD
- Rancho Santa Fe CSD
- Rancho Santa Fe FPD
- Whispering Palms CSD
- CSA No. 17 – Ambulance*
- CSA No. 83 – San Dieguito Parks

Silver Strand Region

- City of Coronado
- City of Imperial Beach

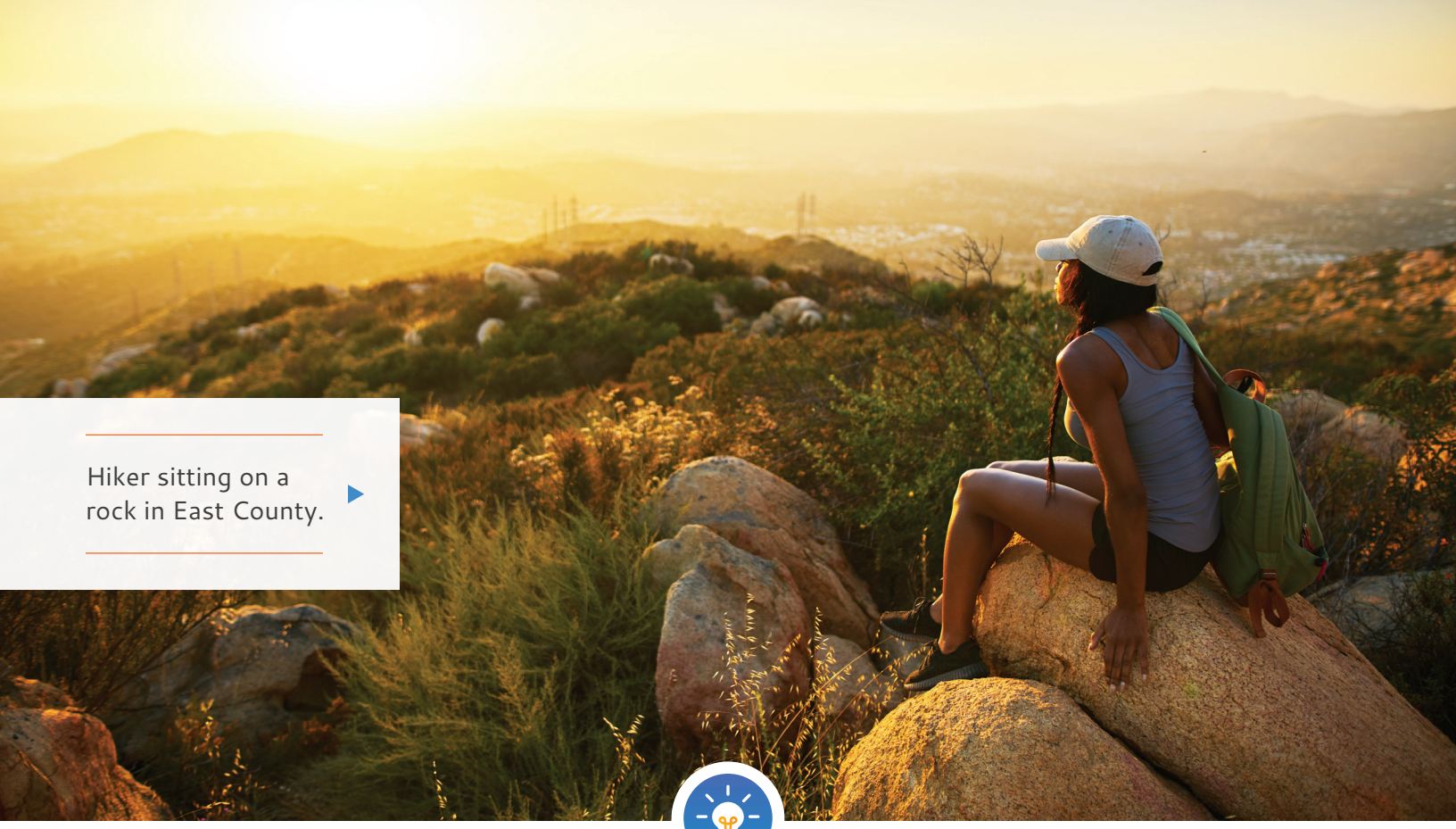
South Coast Region

- City of Chula Vista
- City of National City
- Bonita-Sunnyside FPD
- Lower Sweetwater FPD
- Otay WD*
- San Diego County SD*
- South Bay ID
- CSA No. 122 – Planning

Transit Services

- North County TD

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2026 – 2027

EAST COUNTY FOCUS

Alpine – Lakeside Region

- Alpine FPD
- Lakeside FPD
- Lakeside WD
- Padre Dam MWD*
- San Diego County SD*
- CSA No. 69 – Ambulance
- CSA No. 136 – Sundance Basin

El Cajon – Santee Region

- City of El Cajon
- City of Santee
- Helix WD*
- Padre Dam MWD*

Pauma Valley Region

- Mootamai MWD
- Rincon Ranch CSD
- Pauma CSD
- San Luis Rey MWD
- Yuima MWD

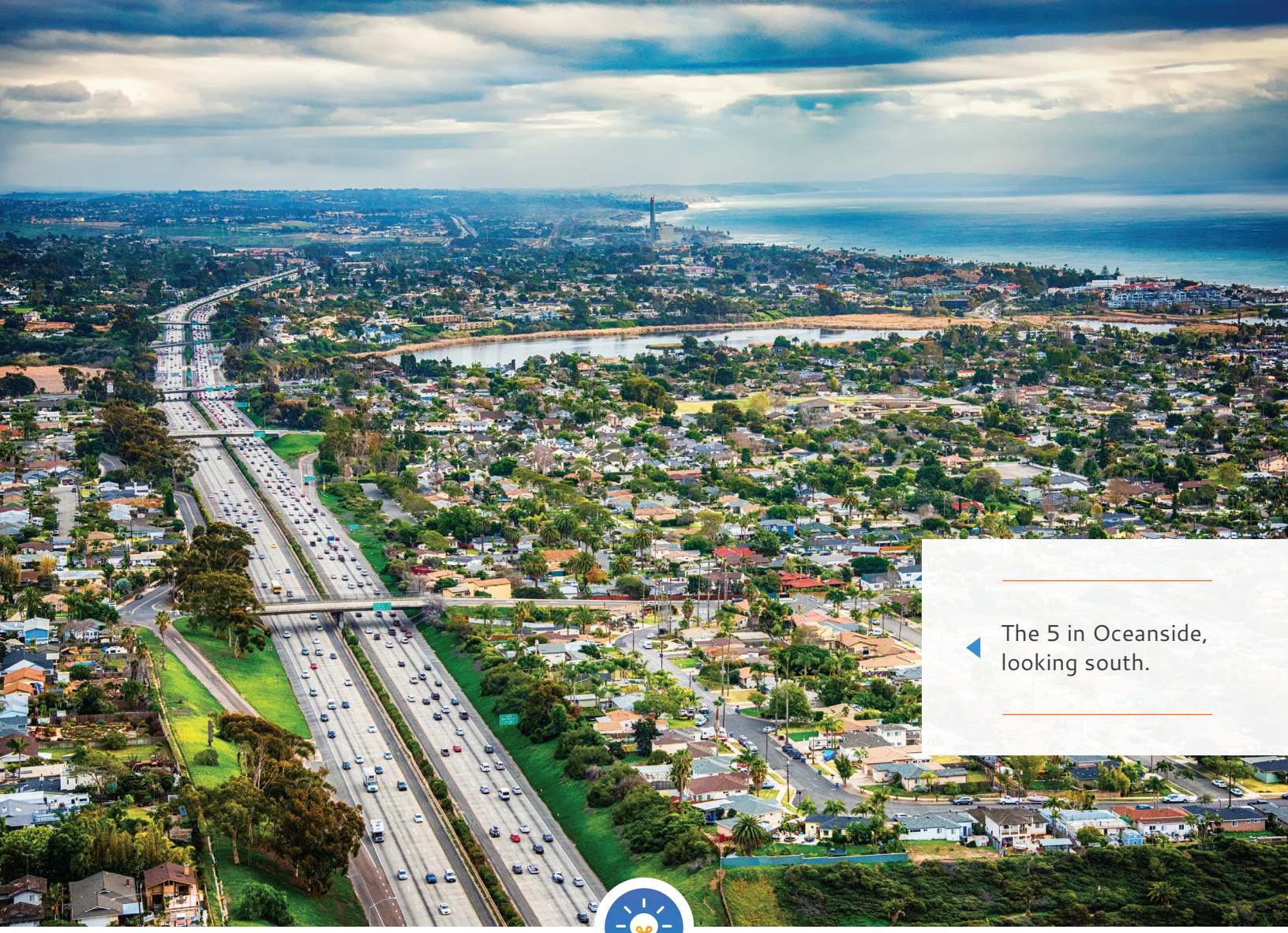
La Mesa – Lemon Grove Region

- City of La Mesa
- City of Lemon Grove
- Helix WD*
- Lemon Grove Roadway LD
- Lemon Grove SD
- San Diego County SD*

Spring Valley Region

- Otay MWD*
- San Miguel FPD
- San Diego County SD*
- CSA No. 69 – Ambulance*
- CSA No. 128 – Parks

*Denotes a special district included in more than one study.



The 5 in Oceanside, looking south.

2027 – 2028

MISCELLANEOUS

Borrego Region
- Borrego Springs FPD
- Borrego WD
- Coachella Valley WD

Cemetery Services
- North County CD
- Pomerado CD
- Ramona CD
- Valley Center CD

Flood Control Services
- San Diego County FCD
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