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

SAN DIEGO COUNTY
LOCAL AGENCY FORMATION COMMISSION

REGULAR MEETING AGENDA
Monday, November 3, 2025

Doors Open: 8:00 A.M.
Meeting Starts: 8:15 A.M.

In-Person Participation
County Administration Center
1600 Pacific Highway, Room 302
San Diego, California

Video-Teleconference Participation
https://www.zoom.us/join
Meeting ID 895 6767 7168 | Passcode 508649
(669) 900-9128

Video Viewing Only
@sandiegolafco9909

San Diego LAFCO		
Commissioner	**Appointing Authority**	**Affiliation**
Chair Stephen Whitburn	Mayor of the City of San Diego	City of San Diego
Vice Chair Barry Willis	Independent Special Districts	Alpine Fire Protection
Paloma Aguirre	Board of Supervisors	County of San Diego
Joel Anderson	Board of Supervisors	County of San Diego
Kristi Becker	Cities Selection Committee	City of Solana Beach
Brigette Browning	Commission	General Public
Jo MacKenzie	Independent Special Districts	Vista Irrigation
Dane White	Cities Selection Committee	City of Escondido
Alternate Eileen Delaney	Commission	General Public
Alternate David A. Drake	Independent Special Districts	Rincon del Diablo MWD
Alternate John McCann	Cities Selection Committee	City of Chula Vista
Alternate Monica Montgomery Steppe	Board of Supervisors	County of San Diego
Alternate Marni von Wilpert	Mayor of the City of San Diego	City of San Diego

Participation Instructions:

In person attendance by the public is welcomed. LAFCO meets in Room 302 in the County Administration Center (1600 Pacific Highway). Three-hour visitor parking is available using the Ash Street entrance. To provide comments on any item, please turn in a speakers slip to LAFCO staff before the item commences.

Remote participation by video or telephone is welcomed through Zoom by following these instructions.

Comments by Video	Comments by Telephone
1. Click or type the link found at the top of the agenda	1. Dial + 1-669-900-9128
2. Type the Meeting ID identified on the top of this agenda followed by the Passcode	2. Dial the Meeting ID identified at the top of the agenda followed by the Passcode
3. Click the raise hand icon	3. Dial *9 to raise your hand
4. LAFCO will announce your name as it appears when it is your turn to speak	4. LAFCO will call out the last 4 digits of your phone number when it is your turn to speak
5. Click the speaker icon to unmute to speak	5. Dial *6 to unmute yourself

All comments – whether provided in person or remotely (video and telephone) – are limited to three minutes for individuals and five minutes for agencies and community organizations. The Chair may adjust the time allowance as they deem appropriate in managing the Commission's business.

Remote participation by e-mail is also welcomed by sending comments to Commission Clerk Erica Sellen at erica.sellen@sdcounty.ca.gov.

- All e-mails received before 3:00 P.M. one business day before the meeting will be forwarded to the Commission and posted online prior to the start of the meeting.
- All e-mails received after 3:00 P.M. one business day before the meeting and up until the conclusion of the item by the Commission will be noted for the record by LAFCO staff with a good-faith summary and subsequently posted online.

The Commission may proceed with the meeting, even where there is a disruption that prevents the Commission from broadcasting the meeting to members of the public or from receiving public comment from members of the public using a call-in option or internet-based service option, unless such disruption prevents a member of the Commission is participating under Government Code Section 54953, subdivision (e) or (f).

Public Accommodations:

Assistance for the disabled is available by contacting LAFCO staff prior to the meeting. To the extent possible, accommodation requests should be submitted at least 72 hours in advance.

Spanish language translation services are readily available at LAFCO meetings. Translation services covering other languages may be made available upon request at least 72 hours prior to the meeting.

Contact Information:

Erica Sellen
Commission Clerk
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1. **8:15 A.M. – CALL TO ORDER BY CHAIR**

   a) Roll Call of Commissioners Present
   b) Pledge of Allegiance

2. **STATEMENT (JUST CAUSE) AND/OR CONSIDERATION OF A REQUEST TO PARTICIPATE REMOTELY (EMERGENCY CIRCUMSTANCES) BY A COMMISSIONER, IF APPLICABLE.**

3. **AGENDA REVIEW**
   The Executive Officer will summarize the agenda, advise on any requested changes, and disclose any supplemental communications received. The Chair will also consider requests from Commissioners to rearrange agenda items.

4. **PUBLIC EXPRESSION AND**
   OPPORTUNITY FOR PUBLIC TO REQUEST DISCUSSION ON CONSENT ITEMS
   Opportunity for members of the public to speak on any subject matter within the Commission's growth management duties and interests that is not on the agenda. Speakers are limited to three minutes. This is also an opportunity to request discussion on a consent calendar item.

5. **CONSENT ITEMS**
   All items calendared as consent are considered ministerial and subject to approval by a single motion. The Chair will consider requests by Commissioners to pull items for discussion.

   a) **Approval of Meeting Minutes for October 6, 2025 (action)**
   The Commission will consider action minutes from the October 6, 2025 meeting prepared by the Commission Clerk. Staff recommends approval as presented. (Pages 7-18)

   b) **Commission Ratification | Recorded Payments for September 2025 (action)**
   The Commission will review a report of all payments made and received for September 2025. Staff recommends ratifying payments as presented. (Pages 19-24)

   c) **Budget Update for 2025-2026 |**
   First Quarter Actuals with Year-End Projections (action)
   The Commission will review a report comparing budgeted and actual transactions through the first quarter of 2025-2026 and related analysis. The Commission finished the first quarter expending 20% of total budgeted expenses while collecting 68% of total budgeted revenues. Staff recommends formally accepting the report. (Pages 25-30)

   d) **Report on Applicant Proposals (information)**
   The Commission will receive a status report on active and anticipated applicant proposals. This is an informational item that satisfies LAFCO's reporting requirement. Information only. (Pages 31-44)

   e) **2025-2026 Workplan Status (action)**
   The Commission will receive a workplan update on the 30 projects scheduled for 2025-2026. Staff recommends receiving and filing the update. (Pages 45-50)

   f) **Legislative Report (information)**
   The Commission will receive an update on active legislation relevant to the agency's regulatory and planning responsibilities. Information only. (Pages 51-56)

CONSENT ITEMS CONTINUED…

g) **Report on Recent Committee Meeting |**
Special Districts Advisory Committee's October 17, 2025 Meeting (information)
The Commission will receive a report on the most recent meeting of its Special Districts Advisory Committee held on October 17th. Information only. (Pages 57-64)

h) **Designation of Labor Agreements (action)**
The Commission will consider designating its labor negotiators for purposes of reviewing – and negotiating if warranted – the salary and benefits of the Executive Officer as part of the annual performance review. Consistent with policy and practice, it is recommended the Commission designate Chair Whitburn, Vice Chair Willis, and Commissioner Becker as its negotiators. (Pages 65-66)

i) **Amendment to Fee Schedule |**
Authorization to Accept Online Payments (action)
The Commission will consider amending its fee schedule to authorize receipt of online payments via credit card and electronic bank transfer. This action completes a holdover from the FY2024–2025 workplan to establish procedures for accepting applicant fees through a third-party payment processor. Staff has identified QuickBooks Payments as the preferred solution due to its compatibility with the Commission's existing accounting platform and comparatively low processing fees. Authorization and a corresponding amendment to the adopted fee scheduled are required before implementation. Staff recommends approval. (Pages 67-78)

6. **PUBLIC HEARING ITEMS |**
COMMISSIONER DISCLOSURE OF EX PARTE COMMUNICATIONS
Public hearing items require expanded public notification per provisions in State law or have been voluntarily scheduled by the Executive Officer to ensure opportunity for public input. All public hearing items require verbal disclosures by Commissions regarding any material communications.

a) **Proposed "AJX Homes LLC – Carmichael Drive Reorganization" |**
Annexation to the City of La Mesa with Concurrent Detachments from San Miguel FPD and CSA No. 135 and Related Actions (RO22-04) (action)
The Commission will consider a reorganization proposal from AJX Homes LLC to annex a 0.27-acre parcel into the City of La Mesa to establish public wastewater service. The proposal includes concurrent detachments from San Miguel Consolidated Fire Protection District and County Service Area No. 135. The affected territory – currently developed with an unoccupied single-family residence at 9365 Carmichael Drive (495-335-05) in unincorporated Valle de Oro – is adjacent to La Mesa. Staff recommends conditional approval with confirming sphere of influence amendments for two of the three subject agencies. Staff further recommends waiver of protest proceedings, proceed without a new municipal service review per Policy L-106, and find the reorganization and sphere amendments exempt under State CEQA Guidelines Sections 15319(a) and 15061(b)(3), respectively. (Pages 79-122)

7. BUSINESS CALENDAR

Business items involve regulatory, planning, or other items that do not require a noticed hearing.

a) Proposed "Bowles – N. Broadway Out-of-Agency Wastewater Services" | City of Escondido (OAS 25-14) (action)

The Commission will consider a request from the City of Escondido to provide new out-of-agency wastewater service to a 1.2-acre parcel in unincorporated Hidden Meadows. The affected territory at 3216 North Broadway (187-500-59) – a single-family residence within Escondido's sphere of influence and 0.2 miles from the City limits – requires the service to support the planned reconstruction of the existing home and addition of an accessory dwelling unit. Staff recommends approval with standard terms, while waiving the typical requirement for the landowner to file a future annexation proposal due to local conditions detailed in the report. Staff further recommends the Commission find the project categorically exempt from environmental review under State CEQA Guidelines Section 15319(b). (Pages 123-146)

b) Proposed "Rancho Hills Change of Organization" | Annexation to Rancho Santa Fe CSD & Related Actions (CO16-11) (action)

The Commission will consider a landowner-initiated annexation of 107.0 acres comprising 44 undeveloped parcels to the Rancho Santa Fe Community Services District (CSD). The affected territory – located in unincorporated Santa Fe Valley and within the Rancho Santa Fe CSD's sphere – requires public wastewater service to accommodate a planned 37-unit residential subdivision ("Rancho Hills"), conditionally approved by the County of San Diego. The proposal excludes other CSD services. Staff recommends conditional approval as submitted and further recommends the Commission waive protest proceedings and adopt the County's environmental findings for the underlying development. (Pages 147-188)

8. EXECUTIVE OFFICER REPORT

9. COMMISSIONER ANNOUNCEMENTS & REQUESTS FOR FUTURE ITEMS

10. CLOSED SESSION

a) Conference with Legal Counsel – Existing Litigation:
Government Code section 54956.9(d)(1)
Case name: *City of San Diego v. San Diego County LAFCO et al*
(San Diego Superior Court Case No. 25CU031043C).

b) Public Employee Performance Evaluation
California Government Code Section 54957(b)
Employee: Keene Simonds

11. ADJOURNMENT

Attest to Posting:

Erica Sellen
Commission Clerk

Blank for Photocopying

5a

AGENDA REPORT
Consent | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Erica Sellen, Commission Clerk

SUBJECT: **Approval of Meeting Minutes | Regular Meeting of October 6, 2025**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider draft minutes prepared for the regular meeting held on October 6, 2025. The minutes are in action form and being presented for formal Commission approval.

BACKGROUND

The Ralph M. Brown Act was enacted by the State Legislature in 1953 and – among other items – requires public agencies to maintain records for qualifying meetings.

DISCUSSION

This item is for San Diego LAFCO to consider approving action minutes for the October 6, 2025 regular meeting. The attendance record for the meeting follows.

- All regular Commissioners were present.
- All alternate Commissioners were present except Monica Montgomery Steppe (County of San Diego) and Marni von Wilpert (City of San Diego).

Administration
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Dane White, City of Escondido
John McCann Alt., City of Chula Vista
Chair Stephen Whitburn, City of San Diego
Marni von Wilpert, Alt., City of San Diego
Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

ANALYSIS

The attached draft minutes for the October 6, 2025 regular meeting accurately reflect San Diego LAFCO's deliberations as recorded by the Commission Clerk. A video recording of the meeting has also been posted on the Commission's website (www.sdlafco.org).

RECOMMENDATION

It is recommended San Diego LAFCO approve the draft minutes prepared for the October 6, 2025 regular meeting as presented. This recommendation is consistent with Alternative One outlined in the proceeding section.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO:

Alternative One (recommended):
Approve the attached draft minutes prepared for the October 6, 2025 regular meeting with any requested corrections or clarifications.

Alternative Two:
Continue the item to the next regular meeting and provide direction as needed.

PROCEDURES

This item has been placed on San Diego LAFCO's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation as provided unless otherwise specified by the Commission.

Respectfully,

Erica A. Sellen

Erica Sellen
Commission Clerk

Attachment:

1) Draft Meeting Minutes for October 6, 2025

DRAFT MINUTES
SAN DIEGO LAFCO
October 6, 2025 REGULAR MEETING

1. 8:15 A.M. – CALL TO ORDER BY CHAIR

Item 1a
ROLL CALL OF COMMISSIONERS PRESENT

The regular meeting was called to order at 8:15 a.m. by Chair Whitburn. The Commission Clerk performed the roll call with the following attendance recorded.

Regulars Present:	Paloma Aguirre, County of San Diego Joel Anderson, County of San Diego Kristi Becker, City of Solana Beach Brigette Browning, Public Jo MacKenzie, Vista Irrigation District Stephen Whitburn, City of San Diego (CHAIR) Dane White, City of Escondido Barry Willis, Alpine Fire Protection District (VICE CHAIR)
Alternates Present:	Eileen Delaney, Public David Drake, Rincon Municipal Water District John McCann, City of Chula Vista
Members Absent:	Monica Montgomery Steppe, County of San Diego (alternate) Marni von Wilpert, City of San Diego (alternate)

The Commission Clerk confirmed a quorum with eight voting members present.

Also present at the time of roll call were the following LAFCO staff members: Executive Officer Keene Simonds, Assistant Executive Officer Priscilla Mumpower, Commission Counsel Aleks Giragosian, Local Government Analyst II Michaela Peters, Local Government Analyst I Meghan Traynor, Communications Associate Aiden Velasquez, GIS Analyst Dieu Ngu, and Commission Clerk Erica Sellen. LAFCO Consultants Patrick Bouteller, Mike Stein, and Adam Wilson were also present.

Item 1b
PLEDGE OF ALLEGIANCE

Commissioner Becker led the Pledge of Allegiance.

2. STATEMENT (JUST CAUSE) AND/OR CONSIDERATION OF A REQUEST TO PARTICIPATE REMOTELY (EMERGENCY CIRCUMSTANCES) BY A COMMISSIONER, IF APPLICABLE

None.

3. AGENDA REVIEW

Chair Whitburn asked Executive Officer Simonds if there were any requests to remove or rearrange items on the agenda. Executive Officer Simonds stated no changes to the agenda were needed while also noting two pieces of supplemental correspondence involving Agenda Item 7c.

4. PUBLIC COMMENT AND OPPORTUNITY FOR PUBLIC TO REQUEST DISCUSSION ON CONSENT ITEMS

Chair Whitburn invited anyone from the public to address the Commission on a matter not directly related to an agenda item.

The following registered speakers addressed the Commission:

- Kurt Worden, Lower Sweetwater Fire Protection District
- Tedi Jackson, Protect Rural Escondido

The Commission Clerk confirmed there were no other registered speakers (audience or remote) or live e-mail comments.

5. CONSENT ITEMS

Item 5a
Approval of Meeting Minutes for August 4, 2025
Item presented to approve draft action minutes prepared for the Commission's August 4, 2025 meeting. Recommendation to approve.

Item 5b
Commission Ratification | Recorded Payments for July and August 2025
Item presented to ratify recorded payments made and received by the Executive Officer for the months of July and August 2025. Recommendation to ratify.

Item 5c
4th Quarter Budget Report for 2024-2025 |
Close of the Fiscal Year and Corrective Amendments
Item presented to review a fourth quarter budget report for 2024-2025. The Commission ended with a net deficit of ($121,839), or (4.4%), primarily due to higher-than-budgeted professional service costs. Recommendation to accept the report and approve close-of-year amendments to ensure all expense units have authorized balances.

Item 5d
Proposed Fund Balance Designations for 2025-2026
Item presented to conduct an annual review of fund balance designations for the new fiscal year. As of July 1, 2025, the total spendable cash fund balance is $1,671,791. Staff proposes maintaining the same designations as the prior fiscal year with one exception: releasing $100,000 from committed to unassigned funds. This adjustment ensures the…

CONSENT ITEMS CONTINUED…

Item 5d Continued…
Agency meets its minimum fund balance benchmark of at least 33% of operating costs in unassigned funds. Recommendation to approve.

Commissioner Willis requested to pull items 5c and 5d for discussion.

Executive Officer Simonds provided a verbal staff presentation and discussed the items.

**

Commissioner Willis motioned with a second from Commissioner Whitburn to approve consent calendar items 5c and 5d with staff recommendation as presented.

Roll call requested:

AYES:	Aguirre, Anderson, Becker, Browning, MacKenzie, Whitburn, White, & Willis
NOES:	None
ABSENT:	Montgomery Steppe & von Wilpert
ABSTAINING:	None

The Commission Clerk confirmed the motion was approved 8-0.

Item 5e
Proposed "Miller & Hall – Vulcan Avenue Change of Organization" |
Annexation to Leucadia Wastewater District (CO25-10) (action)
Item presented to consider a change of organization proposal initiated by Leucadia Wastewater District on behalf of interested landowners. The proposal seeks to annex 0.22 incorporated acres within the City of Encinitas to Leucadia consisting of one developed parcel at 327 North Vulcan Avenue (256-300-40). The annexation would establish public wastewater service for an existing single-family residence currently served by an on-site septic system and accommodate a planned accessory dwelling unit. Recommendation to conditionally approve with a boundary modification to include an adjacent 0.01-acre parcel (256-300-39) comprising the driveway. It is also recommended to waive protest proceedings and find the project exempt under State CEQA Guidelines Section 15303(a).

Item 5f
Notice of Administrative Approval |
"Iannacone–La Cruz Drive Out-of-Agency Wastewater" City of La Mesa (OAS24-06)
Item presented to receive notice of an administrative approval authorizing the City of La Mesa to provide out-of-agency wastewater service to an unincorporated property within its sphere of influence at 4950 La Cruz Drive (495-200-07). The authorization is limited to an existing single-family residence based on documentation of a public health threat from a failed septic system. The approval waives the standard annexation requirement given local conditions as detailed. The project is exempt from environmental review under CEQA Guidelines Section 15269(c). Information only.

CONSENT ITEMS CONTINUED…

Item 5g
Request to Release Approval Condition |
"County Service Area No. 135 Islands Reorganization" (RO16-20)
Item presented to consider its Executive Officer's request to remove a condition from a previously approved five-agency reorganization affecting integrated fire protection, rescue, and emergency medical services for 21,000 acres of unincorporated land in eastern San Diego County. The still-active condition requires the County of San Diego to initiate annexation of 3,274 acres to County Service Area No. 69 for ambulance transport services, but subsequent events have rendered it moot as detailed. Recommendation to approve.

Item 5h
Report on Applicant Proposals
Item presented to receive a status report on active applicant proposals and requests currently on file as well as anticipated filings based on ongoing discussions with proponents. Information only.

Members of the public requested to pull item 5h for discussion.

Executive Officer Simonds provided a verbal staff presentation.

Chair Whitburn invited public comments from the following registered speakers with stated positions to the staff recommendation noted in parenthesis:

- Luisa McCarthy (oppose)
- Doyle Morrison (oppose)
- Alisha Morrison (oppose)
- Luis Sainz (oppose)

The above speakers provided opposition specific to a conditioned annexation to National City involving LAFCO proposal "Delagado-Andrade-24th Street Outside-of-Agency Service Agreement" (OAS/RO24-12).

The Commission Clerk confirmed there were no other registered speakers (audience or remote) or live e-mail comments.

Executive Officer Simonds noted Analyst Meghan Traynor as an appropriate contact for the speakers. General discussion followed. Informational item only. No action.

Item 5i
2025-2026 Workplan Status
Item presented to receive an update on the adopted 2025-2026 workplan and related activities. As the fiscal year enters the second quarter, 10 of 30 special projects are substantively underway, with most activity focused on the Commission's top 10 priorities including municipal service reviews of wholesale water providers, local healthcare districts, and SANDAG. Recommendation to receive and file.

CONSENT ITEMS CONTINUED…

Item 5j
Cost-of-Living Adjustments and Related Benefit Changes
Item presented to consider a compensation package aligned with recent County of San Diego actions, including 3.0% annual COLAs for all eight budgeted positions over each of the next three fiscal years (FY 2025 to FY2028) and annual increases to flexible benefit allocations starting January 1, 2026. The package will cost an estimated $148,000 over three years. Recommendation to approve.

Item 5k
Legislative Report (information)
Item presented to receive an update on active legislation relevant to the agency's regulatory and planning responsibilities. Information only.

Item 5l
Request to Join an Amicus Brief in Support of Monterey LAFCO (action)
Item presented to consider a request from Monterey LAFCO to join an amicus brief supporting an appeal of a trial court decision with potential precedent-setting implications for all LAFCOs. The request includes contributing up to $1,200 toward proportional funding of the legal filing to be prepared by Nossaman LLP. Recommendation to approve based on the benefit of establishing legal precedent affirming that LAFCO actions need only be supported by substantial evidence under LAFCO law, rather than more restrictive standards that could limit LAFCO authority.

Commissioner Becker requested to pull item 5l for discussion.

Commission Counsel Aleks Giragosian provided a verbal staff presentation.

**

Commissioner Becker motioned with a second from Commissioner Willis to approve consent calendar item 5l with staff recommendation as presented.

Roll call requested:

AYES:	Aguirre, Anderson, Becker, Browning, MacKenzie, Whitburn, White, & Willis
NOES:	None
ABSENT:	Montgomery Steppe & von Wilpert
ABSTAINING:	None

The Commission Clerk confirmed the motion was approved 8-0.

[…]

CONSENT ITEMS CONTINUED…

Item 5m
Report on Recent Committee Meeting |
Cities Advisory Committee's September 18, 2025 Meeting
Item presented to receive a report on the most recent meeting of its Cities Advisory Committee held on September 18th. The report is in the form of draft minutes and presented consistent with a request by Commissioner MacKenzie. Information only.

**

Commissioner Willis motioned with a second from Commissioner White to approve the balance of the consent calendar items with staff recommendations (Alternative One) as presented.

Roll call requested:

AYES:	Aguirre, Anderson, Becker, Browning, MacKenzie, Whitburn, White, & Willis
NOES:	None
ABSENT:	Montgomery Steppe & von Wilpert
ABSTAINING:	None

The Commission Clerk confirmed the motion was approved 8-0.

6. PUBLIC HEARING ITEMS |
COMMISSIONER DISCLOSURE OF EX PARTE COMMUNICATIONS

Item 6a
Proposed "Valiano – Eden Hills Reorganization" |
Annexation to the San Marcos Fire Protection District, Detachment from Rancho Santa Fe Fire Protection District and Related Actions (RO/OAS19-26)
Item presented to consider a landowner-initiated reorganization proposal to accommodate the planned 243-unit "Valiano" residential development in Harmony Grove. The proposal involves detaching approximately 11 acres consisting of one parcel located at 1805 Country Club Drive (232-500-24) from the Rancho Santa Fe Fire Protection District (FPD) and annexing it to San Marcos FPD to place the entire 239-acre project site under one fire agency's jurisdiction. Recommendation to conditionally approve with a conforming sphere of influence amendment for Rancho Santa Fe FPD. Conditions include requiring the two subject agencies to submit an OAS agreement as detailed. It is also recommended to waive protest proceedings and Policy L-106, which would otherwise require a new municipal service review to be prepared. CEQA findings are also proposed.

Chair Whitburn invited disclosures from Commissioners on material ex parte communications. No disclosures were reported.

Local Government Analyst II Peters provided the staff presentation.

PUBLIC HEARING ITEMS CONTINUED…

Item 6a Continued…
Chair Whitburn opened the hearing and invited public comments from the following online speaker:

- JP Theberge, Elfin Forest Harmony Grove Town Council

The Commission Clerk confirmed there were no registered speakers (audience or remote) or live e-mail comments.

Chair Whitburn proceeded to invite questions and comments from the Commissioners.

Commission Mackenzie requested clarification on LAFCOs role in the execution of the OAS. Executive Officer Simonds confirmed LAFCO would not have a role under the presumption of utilizing the statutory provision in Government Code Section 56133(e).

The Chair proceeded to close the hearing.

**

Commissioner Becker motioned with a second from Commissioner Willis to approve the staff recommendation (Alternative One) as listed in the agenda report.

Roll call requested:

AYES:	Aguirre, Anderson, Becker, Browning, MacKenzie, Whitburn, White, & Willis
NOES:	None
ABSENT:	Montgomery Steppe & von Wilpert
ABSTAINING:	None

The Commission Clerk confirmed the motion was approved 8-0.

7. BUSINESS ITEMS

Item 7a
Proposed "Brown – Quarry Road LLC Change of Organization" |
Annexation to San Diego County Sanitation District & Related Actions (CO24-14)
Item presented to consider a landowner-initiated proposal to annex 10.7 acres of unincorporated territory in Bonita to the San Diego County Sanitation District. The affected territory consists of one vacant parcel at 5780 Quarry Road (586-050-62). The annexation would provide public wastewater service to accommodate a planned self-storage facility and ancillary improvements, allowed by major use permit under the existing residential zoning. Recommendation of conditional approval without modifications, waiving protest proceedings, and adopting CEQA findings. Staff separately recommended foregoing a sphere of influence amendment given local conditions.

Local Government Analyst I Traynor provided the staff presentation.

BUSINESS ITEMS CONTINUED…

Item 7a Continued…
Chair Whitburn invited comments from the public. The Commission Clerk confirmed there were no registered speakers (audience or remote) or live e-mail comments.

Chair Whitburn proceeded to invite questions and comments from the Commissioners. No discussion.

**

Commissioner Aguirre motioned with a second from Commissioner Willis to approve the staff recommendation (Alternative One) as listed in the agenda report.

Roll call requested:

AYES:	Aguirre, Anderson, Becker, Browning, MacKenzie, Whitburn, White, & Willis
NOES:	None
ABSENT:	Montgomery Steppe & von Wilpert
ABSTAINING:	None

The Commission Clerk confirmed the motion was approved 8-0.

Item 7b
Proposed Update to Rolling Five-Year Study Schedule
Item presented to consider updating its five-year municipal service review (MSR) schedule. The proposed update resets the coverage period from FY 2026 through FY 2030 and constitutes a roll-forward of the existing schedule. Two notable adjustments include removing the completed Oceanside regional review and adding several new reviews, most placed in the latter years. The first two years (FY 2026–2027) correspond to MSRs already authorized and funded in the workplan, including the newly added San Diego Unified Port District review. The final three years (FY 2028–2030) signal long-term intentions and provide notice of upcoming reviews to local agencies and the public. Recommendation to approve, subject to any desired modifications.

Assistant Executive Officer Mumpower provided the staff presentation.

Chair Whitburn invited comments from the public. The Commission Clerk confirmed there were no registered speakers (audience or remote) or live e-mail comments.

Chair Whitburn proceeded to invite questions and comments from Commissioners. No discussion.

**

Commissioner Willis motioned with a second from Commissioner Aguirre to approve the staff recommendation (Alternative One) as listed in the agenda report.

BUSINESS ITEMS CONTINUED…

Item 7b Continued…
Roll call requested:

AYES:	Aguirre, Anderson, Becker, Browning, MacKenzie, Whitburn, White, & Willis
NOES:	None
ABSENT:	Montgomery Steppe & von Wilpert
ABSTAINING:	None

The Commission Clerk confirmed the motion was approved 8-0.

Item 7c
Update on High Priority Project |
Municipal Service Review on Wholesale Water Agencies in San Diego County
Item presented to receive an update on LAFCO's scheduled municipal service review of wholesale water agencies in San Diego County – one of 10 high-priority projects in the approved work plan. This project includes a comprehensive review of the San Diego County Water Authority and proportional review of the MWD. The update is provided for discussion with an opportunity to provide feedback; with the current expectation of delivering a complete draft report as early as March 2026.

Assistant Executive Officer Mumpower provided the staff presentation.

Chair Whitburn invited comments from the public. The Commission Clerk confirmed there were no registered speakers (audience or remote) or live e-mail comments.

Chair Whitburn proceeded to invite questions and comments from the Commissioners.

Commissioners discussed the regional impacts of rising water rates, emphasizing equity, transparency, and affordability considerations. Several Commissioners noted the importance of long-term planning, capturing current policy changes, and exploring potential consolidation opportunities among water agencies. Additional comments referenced ongoing leadership transitions, the recent CWA-MWD settlement, and state legislation affecting the CWA.

No action.

8. EXECUTIVE OFFICER REPORT

Executive Officer Simonds made the following comments:

- Introduced Supervisor Aguirre's new Policy Advisor, Kyle LaVelle.

9. COMMISSIONER ANNOUNCEMENTS & REQUESTS FOR FUTURE ITEMS

Commissioners made the following comments:

- Commissioner Aguirre kindly requested the agenda be available earlier.
- Commissioner MacKenzie seconded Commissioner Aguirre's comment and requested a policy to address old proposals.
- Commissioner Willis thanked LAFCO staff for the SALC 1.0 brochure.

10. ADJOURNMENT TO NEXT MEETING

With no further business, Chair Whitburn adjourned the meeting at 9:48 a.m.

I hereby attest the minutes above accurately reflect the deliberations of the Commission at its October 6, 2025 meeting.

ATTEST,

Erica Sellen
Commission Clerk

5b

AGENDA REPORT
Consent | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Keene Simonds, Executive Officer
Erica Sellen, Commission Clerk

SUBJECT: **Commission Ratification | Recorded Payments for September 2025**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will receive a financial report covering transactions for September 2025. The report documents $202,447 in total expenses authorized by the Executive Officer and $16,235 in payments received. All transactions are consistent with the adopted budget. Staff recommends the Commission ratify these payments with the option to pull the item for discussion if needed.

BACKGROUND

San Diego LAFCO's policies require the Executive Officer to maintain appropriate accounting controls for all Commission financial transactions. Competitive bidding is mandatory for purchases between $10,000 and $124,999, unless waived due to unique circumstances. Transactions of $125,000 or more require Commission approval.

DISCUSSION

This item seeks San Diego LAFCO's ratification of all payments made and received by the Executive Officer during September 2025. Detailed transactions appear in Attachment One. The Commission may pull the item for discussion or provide feedback.

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Chair Stephen Whitburn, City of San Diego
Marni von Wilpert, Alt., City of San Diego
Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

ANALYSIS

September expenses by the Executive Officer total $202,447 with nearly three-fifths - $115,521 - going to the County of San Diego to cover payroll reimbursements for two pay periods and information technology services. The remaining expenses largely involve professional services and liability insurance, with all consultant charges under contract by the Executive Officer detailed in Appendix A. Revenues collected total $16,235 and primarily from local agency apportionment payments.

RECOMMENDATION

It is recommended that San Diego LAFCO ratify the payments made and received by the Executive Officer for September 2025 as presented, consistent with Alternative One below.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO:

Alternative One (recommended):
Ratify the recorded payments received and made by the Executive Officer for September 2025 as shown in Attachments One and Two.

Alternative Two:
Continue to the next regular meeting and provide direction to staff as needed.

Alternative Three
Take no action.[1]

PROCEDURES

This item has been placed on San Diego LAFCO's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation unless otherwise specified by the Commission.

On behalf of the Executive Officer:

Erica A. Sellen

Erica Sellen
Commission Clerk

Appendix: as stated
Attachment: as stated

1 Payment ratifications are not required under LAFCO policy but are presented to the Commission per practice.

Appendix A
Consultant Expenses

Executive Officer Contracts

September 2025

SEPTEMBER 2025	FY TO DATE	ACTIVE CONSULTANTS
$41,049	$71,087	5 of 9

CONSULTANT	PROFESSIONAL SERVICE	SEPTEMBER	FY TO DATE
Arena Public Affairs LLC	Intergovernmental Services	$16,312	$16,312
ADW Consulting LLC	Intergovernmental Services	$10,425	$20,775
Kennedy Water Consulting LLC	Water and Wastewater Services	$7,425	$15,813
Christine O'Rourke	Climate + Environmental Planning	$5,288	$5,288
Michael Stein	Fire Protection, Rescue, EMS + Ambulance	$1,600	$5,400
William Fulton Group	Transportation Planning	$0	$7,500
Progressive Healthcare	Healthcare Services	$0	$0
Michael Haneman	Water Economics	$0	$0
Technical Assistance Collaborative	Homeless Services	$0	$0
TOTAL PROFESSIONAL SERVICES		**$41,049**	**$71,087**

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SAN DIEGO LAFCO
Expenses by Vendor Detail
September 2025

Payable | Receivable Party	Date	Account	Amount	Purpose	Type	Funding Account
E | Ace Parking						
	9/7/2025	52610 · Non-Travel/In-County	10.00	AEO SDCWA Event Parking	credit card	3558-60 · SDCCU Visa Credit Card
	9/17/2025	52530 · Office Lease	1,125.00	Monthly Parking Rent	electronic	1000 · County Account (44595)
	9/17/2025	52530 · Office Lease	26.00	Parking Validations	electronic	1000 · County Account (44595)
			1,161.00			
E | ADW Consulting LLC						
	9/29/2025	52370.F · Professional Services	10,425.00	Consultant Services | Intergovernmental	electronic	1000 · County Account (44595)
E | After Effects (Adobe)						
	9/15/2025	52270 · Memberships	19.99	Monthly Adobe DC Pro Upgrade	debit card	3558 · SDCCU Checking
E | Alliant Insurance Services						
	9/29/2025	52138 · Public Liability Insurance	16,774.97	Liability Insurance FY25-26	electronic	1000 · County Account (44595)
E | Amazon						
	9/10/2025	52344 · Stores Unallocated	109.31	General Office Supplies	credit card	3558-60 · SDCCU Visa Credit Card
	9/25/2025	52344 · Stores Unallocated	13.95	General Office Supplies	credit card	3558-60 · SDCCU Visa Credit Card
			123.26			
E | Ambius						
	9/9/2025	52344 · Stores Unallocated	460.28	Monthly Service for Office Plants	check	3558 · SDCCU Checking
E | Arena Public Affairs LLC						
	9/17/2025	52370.F · Professional Services	16,311.75	Consultant Services | Intergovernmental (Two Months)	electronic	1000 · County Account (44595)
E | Assura Software						
	9/16/2025	52074 · Telecommunications	750.00	Website Hosting Support Services	electronic	1000 · County Account (44595)
E | AT&T Mobility						
	9/9/2025	52074 · Telecommunications	586.14	Monthly Cell Phone | LAFCO Staff	check	3558 · SDCCU Checking
	9/30/2025	52074 · Telecommunications	578.35	Monthly Cell Phone | LAFCO Staff	check	3558 · SDCCU Checking
			1,164.49			
E | Canva						
	9/8/2025	52270 · Memberships	30.00	Monthly Subscription	credit card	3558-60 · SDCCU Visa Credit Card
E | Christine O'Rourke						
	9/17/2025	52370.F · Professional Services	5,287.50	Consultant Services | Climate Action Plan	electronic	1000 · County Account (44595)
E | Colantuono, Highsmith & Whatley						
	9/9/2025	52370.B · Professional Services	5,819.50	Commission Counsel Services | Litigation	check	1004 · SDCCU Holding Account
	9/17/2025	52370.B · Professional Services	6,224.21	Commission Counsel Services	electronic	1000 · County Account (44595)
			12,043.71			
E | Copy 2 Copy						
	9/9/2025	52490 · Publications	2,505.13	SALC 1.0 Brochures	check	3558 · SDCCU Checking
E | Corodata						
	9/30/2025	52330 · Office Expense	187.20	Monthly Document Storage (Three Months)	check	3558 · SDCCU Checking
E | County of San Diego						
	9/1/2025	52354 · Mail/Postage ISF	622.06	Mail/Postage Services	electronic	1000 · County Account (44595)
	9/1/2025	52178 · Vehicle Maintenance	201.65	Vehicle Maintenance Services	electronic	1000 · County Account (44595)
	9/1/2025	52182 · Vehicle Fuel	0.00	Vehicle Fuel	electronic	1000 · County Account (44595)
	9/1/2025	52758 · Vehicle Lease	165.49	Vehicle Lease	electronic	1000 · County Account (44595)
	9/1/2025	52721 et al. · Communications (IT) Services	6,282.14	County IT Services (ITRACK)	electronic	1000 · County Account (44595)
	9/15/2025	52504 · Equipment Rental	1.58	County Surcharge | Xerox	electronic	1000 · County Account (44595)
	9/12/2025	51110 et al. · Employee Payroll	56,279.12	Payroll | Pay Period 2026-06	electronic	1000 · County Account (44595)
	9/26/2025	51110 et al. · Employee Payroll	51,968.97	Payroll | Pay Period 2026-07	electronic	1000 · County Account (44595)
			115,521.01			
E | CSDA San Diego Chapter						
	9/9/2025	52610 · Non-Travel/In-County	63.00	CoWU Lunch Meeting Registration (MT)	debit card	3558 · SDCCU Checking
E | Einstein Bagels						
	9/21/2025	52330 · Office Expense	40.79	Cities Meeting Refreshments	credit card	3558-60 · SDCCU Visa Credit Card
E | Fax Plus						
	9/8/2025	52330 · Office Expense	9.26	Monthly Fax Machine Payment	debit card	3558 · SDCCU Checking
E | Granicus						
	9/29/2025	52370.I · Professional Services	9,546.77	Webiste Support Services FY25-26	electronic	1000 · County Account (44595)

SAN DIEGO LAFCO
Expenses by Vendor Detail
September 2025

Payable | Receivable Party	Date	Account	Amount	Purpose	Type	Funding Account
E | Izzy's Café						
	9/9/2025	52610 · Non-Travel/In-County	51.68	EO & JA Briefing	debit card	3558 · SDCCU Checking
E | Kennedy Water Consulting LLC						
	9/17/2025	52370.F · Professional Services	7,425.00	Consultant Services | Utilities	electronic	1000 · County Account (44595)
E | Michaela Peters						
	9/30/2025	52610 · Non-Travel/In-County	44.00	Cities Meeting Refreshments	check	3558 · SDCCU Checking
E | Michael Stein						
	9/24/2025	52370.F · Professional Services	1,600.00	Consultant Services | Fire	electronic	1000 · County Account (44595)
E | News Library						
	9/21/2025	52270 · Memberships	25.95	SD Tribune Archives Monthly Service	debit card	3558 · SDCCU Checking
E | QuickBooks						
	9/4/2025	52330 · Office Expense	115.00	Monthly Service for Online QuickBooks	credit card	3558-60 · SDCCU Visa Credit Card
E | Ready Refresh Water						
	9/21/2025	52330 · Office Expense	86.94	Monthly Water Services	credit card	3558-60 · SDCCU Visa Credit Card
E | RGS						
	9/17/2025	52370 · Professional Services	31.40	HR Services to the AEO	electronic	1000 · County Account (44595)
E | San Diego Metal Graphics						
	9/8/2025	52330 · Office Expense	86.20	Nameplates for New Commissioners	check	3558 · SDCCU Checking
E | Starbucks						
	9/7/2025	52330 · Office Expense	10.00	Payroll Meeting Donation (ES)	credit card	3558-60 · SDCCU Visa Credit Card
E | The Brigantine						
	9/12/2025	52610 · Non-Travel/In-County	48.01	EO & Port CEO Meeting	debit card	3558 · SDCCU Checking
E | The Corner Drafthouse						
	9/17/2025	52610 · Non-Travel/In-County	64.33	AEO Meeting with Consultants	credit card	3558-60 · SDCCU Visa Credit Card
E | The Market Place						
	9/4/2025	52610 · Non-Travel/In-County	93.75	Monthy Staff Meeting: Agenda Prep	debit card	3558 · SDCCU Checking
	9/4/2025	52610 · Non-Travel/In-County	22.57	Monthy Staff Meeting: Agenda Prep	credit card	3558-60 · SDCCU Visa Credit Card
			116.32			
E | WP Engine						
	9/15/2025	52370.E · Professional Services	59.00	Monthly Web Hosting	debit card	3558 · SDCCU Checking
E | Xerox						
	9/15/2025	52504 · Equipment Rental	235.41	Xerox Rental	electronic	1000 · County Account (44595)
E | YouTube						
	9/11/2025	52270 · Memberships	22.99	Monthly Streaming Support Services	debit card	3558 · SDCCU Checking
EXPENSE TOTAL			202,447.34			
R | Alta Parcels, L.P.						
	9/30/2025	46234 · Applications	610.00	Time Extension Fee (CO22-20)	check	3558 · SDCCU Checking
R | County of San Diego						
	9/30/2025	45918 · LAFCO Apportionment	13,789.98	LAFCO Apportionment FY25-26	electronic	1000 · County Account (44595)
	9/30/2025	49200 · Interest & Dividends	40.36	Interest Payment to Account 46725	electronic	1001 · Committed - Stabilization
	9/30/2025	49200 · Interest & Dividends	62.20	Interest Payment to Account 46726	electronic	1002 · Committed - Opportunity
	9/30/2025	49200 · Interest & Dividends	81.52	Interest Payment to Account 46727	electronic	1003 · Assigned - Executive Officer
			13,974.06			
	9/30/2025	52490 · Publications	50.00	Recording Fees (CO25-07)	check	3558 · SDCCU Checking
R | Pine Vally Improvement Club						
	9/30/2025	46234 · Applications	1,601.25	Processing Fees (CO25-13)	check	3558 · SDCCU Checking
REVENUE TOTAL			16,235.31			

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AGENDA REPORT
Consent | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Keene Simonds, Executive Officer
Erica Sellen, Commission Clerk

SUBJECT: **Budget Update for 2025-2026 |**
First Quarter Actuals with Year-End Projections

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will review a report comparing budgeted and actual transactions through the first quarter of 2025-2026 and related analysis. The total budget for the fiscal year – operating and non-operating – is $3.164 million. The Commission finished the first quarter expending 20% of total budgeted expenses while collecting 68% of total budgeted revenues. The report projects the Commission is on pace to finish the fiscal year generally as expected with a net surplus of $0.022 million or 0.7%. No amendments are recommended at this time. The report is being presented to the Commission to formally accept with the opportunity to pull for additional discussion.

BACKGROUND

San Diego LAFCO's adopted budget for 2025-2026 totals $3.164 million with the majority – $2.681 million – allocated to operating expenses and covers labor and service/supplies costs. Non-operating expenses involve transacting grant awards and debt service. Matching revenue amounts are budgeted for both operating and non-operating units. The total unrestricted cash balance as of July 1, 2025 was $1.672 million with $0.922 million unassigned.

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Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

DISCUSSION

This item is for San Diego LAFCO to receive an update comparison of budget to actual expenses and revenues through the close of the first quarter (September 30, 2025). A detailing of all booked expenses and revenues plus projected year-end totals is provided in general ledger format as Attachment One. The report provides the Commission the opportunity to track trends and provide related direction as needed.

Expenses

San Diego LAFCO's budgeted expense total for 2025-2026 is $3.164 million divided between $2.681 million in operating and $0.483 million in non-operating units. Through the first quarter, actual expenses total $0.637 million or 20% of budget. Staff analysis projects year-end expenses of $3.091 million, yielding savings of $0.072 million or 2.3%. Details on budgeted and actual amounts through the first quarter with year-end projections follow.

Operating: Salaries and Benefits | LAFCO has budgeted $1.589 million in salaries and benefits largely tied to funding 8.0 fulltime equivalent positions. First quarter actuals total $0.400 million or 25% of budget. Staff projects year-end actuals of $1.571 million, yielding a savings surplus of $0.017 million or 1.1% less any amendments.

Operating: Services and Supplies | LAFCO has budgeted $1.092 million in services and supplies largely tied to professional service expenses (e.g., legal, consultants) as well as payments to the County of San Diego for information technology and general support. First quarter actuals total $0.227 million or 21% of budget. Staff projects year-end actuals of $1.037 million, yielding a savings surplus of $0.055 million or 5.0% less any amendments.

Non-Operating | LAFCO has budgeted $0.483 million in non-operating costs covering debt service and grant payments. First quarter expenses total $0.009 million. Staff projects actuals will match the budgeted amount of $0.483 million less any amendments.

Revenues

San Diego LAFCO's budgeted revenue total for 2025-2026 is $3.164 million divided between $2.714 million in operating and $0.450 million in non-operating units. First quarter revenues total $2.156 million or 68% of budget. Staff projects year-end revenues of $3.114 million, yielding a shortfall of ($0.050 million) or (1.6%) attributed to lower-than-expected application fees. Details on budgeted and actual revenues with year-end projections follow.

Operating: Intergovernmental Fees | LAFCO has budgeted $2.181 million in intergovernmental fees divided between LAFCO's four agency membership categories based on statutory formula. First quarter collections total $2.148 million or 98% of invoiced amounts. All invoices are expected to be collected by year-end.

Operating: Service Charges | LAFCO has budgeted $0.200 million in application fees. First quarter actuals total $0.007 million or 4% of budget. Staff projects year-end fees of $0.150 million, yielding a deficit of ($0.050 million) or (25%) less any new amendments.

Operating: Interest | LAFCO has budgeted $0.015 million in interest earnings. First quarter actuals total $0.001 million or 5% of budget. Staff projects year-end collections will meet the budgeted amount.

Operating: Reserves | LAFCO has budgeted $0.317 million in reserve usage. No funds have been drawn through the first quarter. Staff projects the full budgeted amount will be utilized by year-end.

Non-Operating | LAFCO has budgeted $0.450 million in non-operating revenues for anticipated grant awards. No funds have been received through the first quarter. Staff projects the full budgeted amount will be received.

ANALYSIS

First quarter activity shows San Diego LAFCO is proceeding as planned relative to budget. No significant variances appear in actual expenses or revenues through the first three months. Staff projects a year-end net surplus of $0.022 million or 0.7%.

Looking ahead, several variables may influence year-end projections. One of three budgeted analyst positions remains on temporary family-bonding leave, which may require additional professional service costs to maintain workplan pace. Escalating inflation is also affecting services and supplies costs, particularly with non-contract vendors. Staff anticipates these factors will largely offset, keeping year-end results within projected ranges. Any material changes requiring budget amendments will be brought to the Commission for consideration.

RECOMMENDATION

It is recommended San Diego LAFCO accept and file the report and provide related direction to staff as needed. This recommendation is consistent with Alternative One outlined below.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO through a single motion:

Alternative One (recommended):
Accept and file the report with any additional direction to staff as needed.

Alternative Two:
Continue to a future meeting and provide direction to staff with respect to any additional analysis or information requested.

PROCEDURES

This item has been placed on the agenda as part of the consent calendar. Accordingly, a successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation as provided unless otherwise specified by the Commission.

Respectfully,



Keene Simonds
Executive Officer

Attachment:

1) First Quarter Budget Ledger with Year-End Projections

San Diego County Local Agency Formation Commission

Regional Service Planning | Subdivision of the State of California

		FY2025			FY2026				
EXPENSES		**Adopted**	**Amended**	**Actuals**	**ADOPTED**	**Actuals Through 1st Quarter**	**% of Budget**	**Projected Balance $**	**Projected Balance %**
Salaries and Benefits Unit									
Account	Description								
51110 +	Salaries and Per Diems	898,906	898,906	892,617	986,200	250,860	25.4%	980,292	99.4%
51410	Retirement - SDCERA	350,146	350,146	352,251	384,503	100,070	26.0%	381,817	99.3%
51415	Retirement - OPEB	10,196	10,196	9,047	11,112	1,850	16.6%	10,008	90.1%
51450	Payroll Taxes	65,044	65,044	63,697	71,457	17,688	24.8%	70,090	98.1%
51510 +	Group Insurance	143,481	143,481	115,039	134,394	29,888	22.2%	128,099	95.3%
51560	Unemployment Insurance	1,000	1,000	362	1,000	70	7.0%	1,000	100.0%
		1,468,773	1,468,773	1,433,013	1,588,667	400,426	25.2%	1,571,306	98.9%
Services and Supplies Unit									
Account	Description								
52074	Communications	42,299	42,299	40,596	50,726	4,128	8.1%	48,511	95.6%
52138	General Liability Insurance	14,194	14,194	15,599	15,599	16,775	107.5%	16,775	107.5%
52178	Vehicle - Maintenance	1,000	1,000	1,814	1,000	492	49.2%	1,000	100.0%
52182	Vehicle - Fuel	500	500	490	500	28	5.5%	500	100.0%
52270	Memberships	38,736	38,736	25,467	34,807	5,947	17.1%	30,000	86.2%
52304	Miscellaneous	50	50	18	50	8	16.0%	50	100.0%
52330	Office: General Support	12,380	12,380	11,066	13,217	1,683	12.7%	5,000	37.8%
52332	Office: Postage USPS	250	250	495	250	-	0.0%	250	100.0%
52334	Office: Design + Printing	23,000	23,000	11,958	22,500	10,000	44.4%	22,500	100.0%
52336	Office: Books and Guidelines	-	-	132	-	-	0.0%	-	0.0%
52344	Office: Supplies + Furnishings	12,100	12,100	13,783	10,300	1,905	18.5%	8,000	77.7%
52354	Office: County Mail Services	10,000	10,000	7,817	10,000	1,711	17.1%	8,000	80.0%
52370	Professional Services	445,767	698,558	698,558	566,600	107,981	19.1%	550,000	97.1%
52490	Publications + Legal Notices	8,500	8,500	21,142	7,000	4,674	66.8%	10,000	142.9%
52504	Leases: Equipment	4,500	4,500	3,335	4,000	474	11.8%	4,000	100.0%
52530	Leases: Office Space	154,308	154,308	157,167	158,688	28,348	17.9%	158,000	99.6%
52550	Special Expenses: County Overhead	33,000	33,000	57,293	58,000	15,185	26.2%	60,739	104.7%
52562	Special Expenses: New Hire Checks	-	-	215	-	-	0.0%	-	0.0%
52566	Special Expenses: Minor Equipment	-	-	3,699	-	348	0.0%	348	0.0%
52610	Travel-Training | In County	2,700	2,700	14,193	2,700	1,641	60.8%	2,700	100.0%
52612	Employee Auto + Reimbursements	8,700	8,700	11,068	8,700	2,333	26.8%	8,700	100.0%
52622	Travel-Training | Out of County	15,050	15,050	23,771	15,050	1,820	12.1%	7,500	49.8%
52721	IT Reimbursements: Network	18,000	18,000	18,193	18,000	4,626	25.7%	18,000	100.0%
52723	IT Reimbursements: Data Center	30,000	30,000	12,504	27,000	2,362	8.7%	15,000	55.6%
52725 +	IT Reimbursements: Financial Systems	25,000	25,000	18,083	23,000	3,975	17.3%	17,500	76.1%
52732	IT Reimbursements: Desktop Computing	30,000	30,000	26,744	30,000	7,110	23.7%	30,000	100.0%
52734	IT Reimbursements: Help Desk	2,331	2,331	1,608	2,331	379	16.3%	2,000	85.8%
52750	IT Reimbursements: Catalog Equipment	25,000	25,000	6,389	10,000	2,818	28.2%	10,100	101.0%
52758	Fleet Reimbursements: Lease	2,000	2,000	1,986	2,000	496	24.8%	2,000	100.0%
		959,364	1,212,155	1,205,183	1,092,018	227,245	20.8%	1,037,173	95.0%
	OPERATING EXEPENSE TOTAL	2,428,138	2,680,929	2,638,196	2,680,685	627,671	23.4%	2,608,479	97.3%

EXPENSES CONTINUED...

		FY2025			FY2026				
		Adopted	Amended	Actuals	ADOPTED Final	Actuals Through 1st Quarter	% of Budget	Projected Year End $	Projected Year End %
Non Operating Unit									
Account No.	Description								
51421	Debt Service: OPEB Bonds	34,092	34,092	33,591	33,000	9,096	27.6%	33,000	100.0%
85000	Grant Award Payments	450,000	450,000	198,478	450,000	-	0.0%	450,000	100.0%
		484,092	484,092	232,069	483,000	9,096	1.9%	483,000	100.0%
	EXPENSE TOTALS	2,912,230	3,165,021	2,870,265	3,163,685	636,767	20.1%	3,091,479	97.7%

REVENUES

		FY2025			FY2026				
		Adopted		Actuals	ADOPTED Final	Actuals Through 1st Quarter	% of Budget	Projected Year End $	Projected Year End %
Intergovernmental Unit									
Account No.	Description								
45918.1	Apportionments | County	623,997	623,997	623,997	654,902	654,902	100.0%	654,902	100.0%
45918.2	Apportionments | Cities (less SD)	623,997	623,997	623,997	654,902	654,902	100.0%	654,902	100.0%
45918.3	Apportionments | San Diego	312,108	312,108	312,108	327,566	327,566	100.0%	327,566	100.0%
45918.4	Apportionments | Special Districts	623,997	623,997	734,786	544,113	510,308	93.8%	544,113	100.0%
		2,184,098	2,184,098	2,294,888	2,181,483	2,147,678	98.5%	2,181,483	100.0%
Service Charges Unit									
Account No.	Description								
46234	Application Fees	200,000	200,000	212,386	200,000	7,255	3.6%	150,000	75.0%
		200,000	200,000	212,386	200,000	7,255	3.6%	150,000	75.0%
Miscellaneous									
Account No.	Description								
44105	Interest and Dividends	15,000	15,000	9,084	15,000	759	5.1%	15,000	100.0%
47540	Reserves	63,132	181,492	181,492	317,202	-	0.0%	317,202	100.0%
		78,132	196,492	190,576	332,202	759	0.2%	332,202	100.0%
	OPERATING REVENUE TOTAL	2,462,230	2,580,590	2,697,850	2,713,685	2,155,692	79.4%	2,663,685	98.2%
Non-Operating Unit									
Account No.	Description								
85000	Grant Awards	450,000	450,000	172,415	450,000	-	0.0%	450,000	100.0%
		450,000	450,000	172,415	450,000	-	0.0%	450,000	100.0%
	REVENUE TOTALS	2,912,230	3,030,590	2,870,265	3,163,685	2,155,692	68.1%	3,113,685	98.4%
TOTAL NET		-		-	-			**22,206**	**0.7%**

CASH FUND BALANCE (spendable - unrestricted)	FY2023 July 1st	FY2024 July 1st	FY2025 July 1st	FY2026 July 1st
Committed				
… Stabilization	500,000	500,000	500,000	500,000
… Opportunity	250,000	250,000	250,000	150,000
Assigned by EO	62,500	125,000	100,000	100,000
Unassigned	735,065	762,356	882,010	921,791
	1,547,565	1,637,356	1,732,010	1,671,791

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AGENDA REPORT
Consent | Information

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Priscilla Mumpower, Assistant Executive Officer
Michaela Peters, Analyst II

SUBJECT: **Report on Applicant Proposals**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will receive a status report on active applicant proposals and requests currently on file as well as anticipated filings based on ongoing discussions with proponents. The item is for information and concurrently satisfies LAFCO's reporting requirement involving petition-initiated proposals.

BACKGROUND

Procedures and Timelines

Most jurisdictional changes begin with petitions filed by landowners or voters, though local agencies may also initiate through resolutions. LAFCO can independently initiate changes to form, consolidate, or dissolve special districts following approved municipal service reviews. Jurisdictional changes typically require four to six months before hearing, while out-of-agency service requests process in about two months.

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Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

DISCUSSION

This item updates San Diego LAFCO on active proposals and previews pending submissions anticipated in the near term. The report also satisfies the Commission's statutory obligation to provide agenda notice for petition-initiated jurisdictional changes. Commissioners may consider pulling the item for discussion and/or clarifications.

Twenty-seven (27) active proposals are currently on file. Twenty (20) are under review pending Commission consideration, while seven (7) await recordation following conditional approval.[1] Staff has identified six (6) pending proposals through discussions with prospective applicants. A complete listing of all active and pending proposals is attached.

ANALYSIS

None.

RECOMMENDATION

This item is presented to San Diego LAFCO for information only.

ALTERNATIVES FOR ACTION

None.

PROCEDURES

This item has been placed on the San Diego LAFCO's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation unless otherwise specified by the Commission.

On behalf of the staff,

Michaela Peters

Michaela Peters
Local Government Analyst II

Attachment:

1) Active and Pending Proposals as of October 31, 2025

[1] Six additional proposals remain on file with the Commission; however, discussions have been inactive for approximately a decade. The Commission anticipates formally abandoning these proposals pending adoption of related authorizing policies. All proposal files are available for public review upon request at the San Diego LAFCO office.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
ACTIVE PROPOSAL APPLICATIONS | PENDING COMMISSION ACTION				
1	CO16-11	"Rancho Hills Change of Organization" - Rancho Santa Fe CSD: Annexation	Meghan Traynor	*Original application submitted in October 2016 and administratively paused due to pending receipt of additional documentation.* Application re-submitted in May 2025 by landowner petition to annex 44 parcels spanning approximately 107.0 acres of unincorporated territory within the Santa Fe Valley community to the Rancho Santa Fe Community Services District. The planned development – "Pinnacle at Santa Fe Valley" – involves a 37-unit residential subdivision consistent with a November 2006 approval by the County Board of Supervisors. The purpose of the proposal is to facilitate the delivery of wastewater services to the project. The Commission is scheduled to consider the proposal as a business item at its November 3rd, 2025 meeting.
2	CO21-09	"Otay Lakes Road Change of Organization" - City of Chula Vista: Annexation	Michaela Peters	Application submitted in October 2022 by landowner petition to annex approximately 1,870 acres of unincorporated territory to the City of Chula Vista. (The petitioners originally filed an application in October 2021 seeking approval to annex into the San Diego County Sanitation District. This previous application has since been withdrawn.) The affected territory comprises 6 parcels within the Baldwin and Moller communities and is presently undeveloped. The proposal is intended to facilitate the development of a 1,938 residential subdivision with various ancillary uses as part of the "Otay Ranch Resort Village 13" project. The submitted proposal application is incomplete and pending receipt of additional documentation and information from the applicant – including an agreement with LAFCO to proceed with a targeted/informing municipal service review. Discussions remain active.
3	CO22-04	"AJX Homes - Carmichael Change of Organization" - City of La Mesa: Annexation - City of La Mesa: Sphere Action (+) - San Miguel FPD: Detachment - San Miguel FPD: Sphere Action (-) - CSA No. 135: Detachment	Michaela Peters	Application submitted in February 2022 by landowner petition involving annexation of 0.27 acres of unincorporated territory within the Valle de Oro Community to the City of La Mesa for wastewater service. The affected territory is currently developed with a single-family residence, and the landowner intends to update the existing site from a septic system to the public wastewater system. The affected territory requires a conforming sphere of influence amendment to City of La Mesa along with current detachments from San Miguel Fire Protection District and County Service Area No. 135. The Commission is scheduled to consider the proposal as a public hearing item at its November 3rd, 2025 meeting.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
4	OAS22-08 CO22-08	"Martinez - North Avenue Reorganization" - City of Escondido: Annexation - County Service Area No. 135: Detachment - Deer Springs Fire Protection District: Detachment	Meghan Traynor	Application submitted in April 2022 by landowner petition and involves an outside-of-agency service agreement for wastewater services to a single-family residence totaling 0.25 acres to remedy a failing septic system. The Executive Officer administratively approved the service request on May 3, 2022 with a conditional approval to annex into the City of Escondido. The application is incomplete pending receipt of additional documentation and related information. Discussions remain active.
5	RO22-11	"Tummala - Rincon MWD Reorganization" - Rincon del Diablo MWD: Annexation - Metropolitan Water District: Annexation - San Diego CWA: Annexation	Michaela Peters	Application submitted in October 2022 by landowner petition involving annexation of approximately 20 acres of unincorporated territory to make available public water services. The affected territory is currently vacant and undeveloped. The proposal's purpose is to position the landowner to proceed in the future with a development plan with the County of San Diego. The application is incomplete pending receipt of additional documentation and related information.
6	CO23-11	"Nencini Associates Change of Organization" - San Diego County SD: Annexation	Michaela Peters	Application submitted in July 2023 by landowner petition and involves annexation of approximately 20.6 acres to the San Diego County Sanitation District (SD) for the primary purpose of establishing wastewater service. The affected territory is partially developed with one single-family residence, with plans to develop an additional 7 single-family residences through subdivision. Conditional approval for future annexation to the City of Chula Vista is recommended. The application is incomplete pending receipt of additional documentation and related information. Discussions remain active.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
7	CO23-15	"Maclachlan - Old Highway 80 Change of Organization" - San Diego County SD: Annexation	Michaela Peters	Application submitted in December 2023 by landowner petition and involves annexation of approximately 0.60 acres to the San Diego County Sanitation District for the primary purpose of establishing wastewater service. The affected territory is currently undeveloped with plans to develop a commercial building and parking lot. The application is incomplete pending receipt of CEQA documentation and related information. Discussions remain active.
8	RO24-07	"Lake Wohlford Resort Reorganization" - Valley Center MWD: Annexation	Meghan Traynor	Fee submitted in March 2024 for an anticipated reorganization application involving the annexation of approximately 127 acres to the Valley Center Municipal Water District for the purpose of receiving potable water service. The affected territory is presently developed with 137 mobile homes and one restaurant currently served by an onsite water system. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.
9	RO24-08 OAS24-08	"Shen – Pinecrest Ave Out-of-Agency Service Agreement" - City of Escondido: Annexation - County Service Area No. 135: Detachment	Meghan Traynor	Application submitted in August 2024 by landowner petition involving an out-of-agency service agreement to establish wastewater services to a single-family residence totaling 1.09 acres to remedy to a failing septic system. The Executive Officer administratively approved the service request on September 6, 2024. The proposal was approved as a consent (information only) item as part of the Commission's October 7, 2024. The administrative approval is conditioned on the landowner submitting a complete change of organization application to LAFCO for formal annexation into the City of Escondido within one calendar year unless a time extension is authorized. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
10	RO24-12 OAS24-12	"Delgado-Andrade – 24th Street Outside-of-Agency Service Agreement" - City of National City: Annexation - City of National City: Sphere Action (+) - County Service Area No. 135: Detachment - Lower Sweetwater Fire Protection District: Detachment - South Bay Irrigation District: Detachment	Meghan Traynor	Application submitted in August 2024 by landowner petition involving an out-of-agency service request for wastewater services to a developed single-family residence on less than an acre to remedy a failing septic system. The Executive Officer administratively approved the service request on October 23, 2024 and the proposal was approved as a consent item as part of the Commission's November 4, 2024 meeting. The administrative approval is conditioned on the landowner submitting a complete change of organization application to LAFCO for formal annexation into the City of National City within one calendar year unless a time extension is authorized. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.
11	SRO24-15	"La Jolla Incorporation" - La Jolla: Incorporation - City of San Diego: Detachment - City of San Diego: Sphere Action (-)	Priscilla Mumpower	Notice of Intent to Circulate Petition was submitted May 2024 in anticipation of a special reorganization application filing. The proposal involves the detachment of approximately 8,371 acres from the City of San Diego and the incorporation of the community of La Jolla, along with conforming sphere of influence amendments. LAFCO staff has confirmed the proponents have collected enough valid petitions equal to no less than 25% of all registered voters within the proposed municipal boundary, which covers the entirety of the 92037 zip code with an estimated population of 47,000. LAFCO staff will now proceed in initiating the administrative review on the proposal and headlined by selecting an outside consultant to prepare a comprehensive fiscal analysis evaluating the ability of La Jolla to fund a sufficient level of municipal services while assessing monetary impacts to the City of San Diego.
12	CO25-01 OAS25-01	"Hallam – Lovely Lane Out-of-Agency Service Agreement" - Buena Sanitation District: Annexation	Meghan Traynor	Application submitted in January 2025 by landowner petition involving an out-of-agency service agreement to establish wastewater services to a single-family residence totaling 0.67 acres to remedy a failing septic system. The Executive Officer administratively approved the service request on January 22, 2025 and the proposal was approved as a consent item as part of the Commission's February 3, 2025 meeting. The administrative approval is conditioned on the landowner submitting a complete change of organization application to annex to the Buena Sanitation District within one calendar year unless a time extension is authorized. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
13	OAS25-02	"Garza – Touchstone Communities Out-of-Agency Wastewater Services" - City of Escondido: OAS	Michaela Peters	Application submitted in January 2025 by the City of Escondido for an out-of-agency service agreement involving a 10.35-acre unincorporated parcel currently developed with one single-family residence. The proposal is intended to facilitate the development of a 42-unit single-family residential subdivision by "Touchstone Communities" and abate an impending public health and safety threat given the size of the proposed development. The application is incomplete pending receipt of CEQA documentation and related information. Discussions remain active.
14	OAS25-03 RO25-03	"Lopez – Bear Valley Parkway Out-of-Agency Wastewater Services" - City of Escondido: Annexation - County Service Area No. 135: Detachment	Michaela Peters	Application submitted in January 2025 by the City of Escondido on behalf of the landowner requesting an out-of-agency service agreement to establish wastewater services to remedy a failing septic system. The affected territory spans 1.37 acres and is developed with a single-family residence and ADU. The Executive Officer administratively approved the service request on February 7, 2025 and the proposal was approved as a consent item as part of the Commission's March 3, 2025 meeting. The administrative approval is conditioned on the landowner submitting a complete change of organization application to LAFCO for formal annexation into the City of Escondido within one calendar year unless a time extension is authorized. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.
15	OAS25-09	"Mayer – Santa Fe Avenue Out-of-Agency Wastewater Services" - Buena Sanitation District: OAS	Michaela Peters	Application submitted in March 2025 by the Buena Sanitation District on behalf of the landowner requesting out-of-agency wastewater services to facilitate the development of a 46-unit townhouse development on approximately 2.91-acres. The affected territory includes three APNs located in the City of San Marcos. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
16	OAS25-11 RO25-11	"Halstead – Olivewood Lane OAS Wastewater Services" - San Diego County Sanitation District: OAS	Meghan Traynor	Application submitted in April 2025 by the San Diego County Sanitation District on behalf of the landowner requesting out-of-agency wastewater services to accommodate an existing single-family residence to remedy a failing septic system. The Executive Officer administratively approved the service request on April 23, 2025. The administrative approval is conditioned on the landowner submitting a complete change of organization application to LAFCO for formal annexation into the City of Escondido within one calendar year unless a time extension is authorized. The Commission conditionally approved the out-of-agency wastewater service agreement on June 2, 2025. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.
17	OAS25-13 CO25-13	"Goodwin – Pine Valley Improvement Club Out-of-Agency Wastewater Services" - San Diego County Sanitation District: Annexation	Meghan Traynor	Application submitted in July 2025 on behalf of the Pine Valley Improvement Club requesting out-of-agency wastewater services to accommodate an existing commercial building to remedy a public health risk posed by the proximity of the existing septic system to a non-conforming well on-site. The Executive Officer administratively approved the service request on July 22, 2025. The proposal was approved as a consent (information only) item as part of the Commission's August 4, 2025 meeting. The administrative approval is conditioned on the landowner submitting a complete change of organization application to LAFCO for formal annexation into the San Diego County Sanitation District within one calendar year unless a time extension is authorized. The application is incomplete pending receipt of a complete application and related information. Discussions remain active.
18	OAS25-14	"Bowles– North Broadway Out-of-Agency Wastewater Services" - City of Escondido: OAS	Meghan Traynor	Application submitted in July 2025 by a landowner requesting out-of-agency wastewater services to accommodate the demolition and reconstruction of an existing single-family residence on a 1.23-acre parcel. The County Department of Environmental Health and Quality determined sanitary sewer service for the subject property is necessary based on the subject parcel's size and high groundwater level in the surrounding area. The Commission is scheduled to consider the proposal as a business item at its November 3rd, 2025 meeting.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
19	CO25-15	"Jaiswal – Rio Vista Road Change of Organization" - Rancho Santa Fe CSD: Annexation	Meghan Traynor	Application submitted in October 2025 by a landowner petition involving annexation of approximately 2.6 acres of unincorporated territory in the San Dieguito community to the Rancho Santa Fe Community Services District for the primary purpose of establishing wastewater service. The affected territory consists of four parcels: three are developed with single-family residences, while one remains undeveloped with no current plans for development on any of the parcels. The proposal is currently under administrative review and considered incomplete at this time. Discussions remain active.
20	OAS25-15	"Barona Band of Mission Indians Out-of-Agency Wastewater Services" - Ramona MWD: OAS - San Diego CWA: OAS - Metropolitan Water District of So. CA: OAS	Michaela Peters	Application submitted in October 2025 by the Ramona MWD on behalf of the Barona Band of Mission Indians requesting an out-of-agency service agreement to establish wastewater services to (1) provide reliable water service to support existing residential development where private wells have proven unreliable, and (2) to accommodate future development within the Reservation. The affected territory involves approximately 1,784 unincorporated acres within the Barona Reservation. The Metropolitan Water District of Southern California, the San Diego County Water Authority, and the Ramona Municipal Water District (MWD) are parties to the proposed agreement with the Barona Band of Mission Indians to extend public water service to the affected territory. The territory is located adjacent to Ramona MWD. The proposal is currently under administrative review and considered incomplete at this time. Discussions remain active.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
ACTIVE PROPOSALS | POST COMMISSION ACTION				
21	SA16-20 LP16-20	"CSA No. 135 Islands Reorganization" - CSA No. 135 – LP Fire Area: Latent Powers Expansion - Bonita-Sunnyside FPD: Annexation - Lakeside FPD: Annexation - San Miguel FPD: Annexation - Ramona MWD: Annexation	Staff	Proposal submitted November 2016 by resolution of the San Diego County Fire Authority. Involved annexation of remaining unserved Islands 2, 3, and 4 via reorganization of local fire service territory among five local agencies: CSA 135; Bonita-Sunnyside FPD; Lakeside FPD; Ramona MWD; and San Miguel FPD. Reorganization involved annexation to the subject agencies and expansion of CSA No. 135's latent powers to provide fire protection and emergency medical services to three unincorporated and unserved island areas totaling approximately 21,048 acres. Conforming amendments to add the affected territory to the subject agencies' spheres of influence were also required. The reorganization proposal was approved February 4, 2018 and is now pending recordation once all terms are satisfied. A noticed protest hearing was held on March 13, 2019 at the LAFCO office. No protest was received by affected registered voters or landowners. The Commission released a final condition at its October 6th meeting and is now pending final recordation.
22	CO22-20	"Camino De La Fuente - Wick Change of Organization" - San Diego County SD: Annexation	Michaela Peters	Application submitted in November 2022 by landowner petition and involves annexation of approximately 35.3 acres of unincorporated and undeveloped territory to the San Diego County Sanitation District to make available public water and wastewater services. The proposal's purpose is to position the landowner to proceed in the future with a development plan to grade the land for future industrial and outdoor storage uses. The proposal was approved by the Commission on October 2nd, 2023. The applicant requested a formal extension to September 18th, 2025 in order to satisfy the necessary terms and conditions outlined in the adopted resolution. The applicant filed an additional extension to October 2nd, 2026.
23	RO24-17	"Biermann – N Ash Street Change of Organization" - City of Escondido: Annexation - County Service Area No. 135: Detachment	Meghan Traynor	Application submitted in October 2024 by landowner petition and involves annexation of 0.74-acre parcel in unincorporated territory to the City of Escondido for the purpose of receiving wastewater service. The subject parcel is currently developed with one single-family residence. The request for public wastewater is to accommodate a lot split with a proposed development of an additional single-family residence and two ADUs. The proposal was approved by the Commission on May 2, 2025 and now pending completion of terms and conditions as set forth by the Commission.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
24	CO25-07	"Balazs – Artesian Breeze Way Change of Organization" - Rancho Santa Fe CSD: Annexation	Meghan Traynor	Application submitted in March 2025 by landowner petition involving an annexation of approximately 2.41 acres to the Rancho Santa Fe Community Services District for the primary purpose of establishing wastewater services. The affected territory is currently undeveloped with plans to develop one 10,000 square-foot single-family residence. The proposal was approved by the Commission on August 4, 2025 and now pending completion of terms and conditions as set forth by the Commission.
25	RO19-26	"Valiano - Eden Valley Reorganization" - San Marcos FPD: Annexation - Rancho Santa Fe FPD: Detachment - Rancho Santa Fe FPD: Sphere Action (-) - Rancho Santa Fe FPD: Extraterritorial Fire	Michaela Peters	Application submitted in January 2025 by landowner petition and the City of Escondido involving a reorganization as part of the "Valiano" planned development in Harmony Grove. The reorganization involves the concurrent annexation of 10.8 unincorporated acres to San Marcos FPD with detachment from Rancho Santa Fe FPD and related sphere amendments. The proposal was approved by the Commission on October 6, 2025 and now pending completion of terms and conditions as set forth by the Commission.
26	CO24-14	"Quarry Road LLC Change of Organization" - San Diego County SD: Annexation	Meghan Traynor	Application submitted in September 2024 by landowner petition involving an annexation of approximately 10.7 acres to the San Diego County Sanitation District for the primary purpose of establishing wastewater services. The affected territory is currently undeveloped with plans to develop a commercial storage facility. The proposal was approved by the Commission on October 6, 2025 and now pending completion of terms and conditions as set forth by the Commission.
27	CO25-10	"Miller & Hall – Vulcan Avenue Change of Organization" - Leucadia Wastewater District: Annexation	Michaela Peters	Application submitted in April 2025 by resolution of the Leucadia Wastewater District. The affected territory comprises one parcel approximately 0.22-acres in size with an existing single-family residence utilizing an onsite septic system. The proposal requests the establishment of public wastewater services intended to facilitate the existing single-family residence and planned development of an ADU. The proposal was approved by the Commission on October 6, 2025 and now pending completion of terms and conditions as set forth by the Commission.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
PENDING PROPOSAL APPLICATION SUBMITTALS (No project manager; inquiries should be directed to Keene Simonds)				
	Pending	"Harvest Hills Reorganization" - City of Escondido: Annexation		This anticipated reorganization proposal is currently undergoing development and environmental review by the City of Escondido. Submittal to LAFCO anticipated for late 2020-2021 if approved by Escondido. The anticipated proposal involves annexation of approximately 1,098 acres to the City for the primary purpose of developing a 550-lot residential subdivision. All the affected territory presently lies outside the adopted Escondido sphere. Due to the scope of the proposal area a comprehensive update of the City's sphere is warranted along with preparing the supporting municipal service review document. These and other service-related issues have been communicated to the City and are currently under joint review with other local stakeholders. Project was originally titled as "Safari Highlands".
	Pending	"Rancho Lomas Verde Reorganization" - City of Vista: Annexation		This anticipated reorganization proposal is undergoing development and environmental review by the City of Vista. The proposal involves annexation of approximately 300 acres to the City of Vista and concurrent detachments from CSA 135 and the Vista FPD to facilitate a 153-lot residential development. Close to three-fourths of the project area lies outside the adopted Vista sphere. Due to the scope of the proposal area a comprehensive update of the City's sphere is warranted along with preparing the supporting municipal service review document. These and other service-related issues have been communicated to the City and are currently under joint review with other local stakeholders.
	Pending	"Sager Ranch Reorganization" - City of Escondido: Annexation		This anticipated reorganization involves annexation of approximately 1,800 unincorporated acres to the City of Escondido and concurrent detachments from CSA 135 and the Valley Center FPD. The reorganization would facilitate the proposed development of approximately 200 acres to include 203 residential units and a 225-room resort. Portions of the project area lie outside the current City sphere. Fire protection service remains a key discussion point and the source of ongoing discussions with the proponents.

	File Number	Proposal Name | Affected Agencies	Project Manager	Proposal Summary
	Pending	"Harmony Grove Village South" (TM-626) - Rincon del Diablo MWD: Annexation		This anticipated reorganization involves the unincorporated Harmony Grove Village South project and specific to accommodating sewer services (among a variety of options) for the planned development of approximately 111 acres to include 453 residential units. On January 27, 2020 the San Diego Superior Court overturned the County's development approvals for the project. Appeals are pending with no update as of this report.
	Pending	"Escondido Village – Unison Communities" - City of Escondido: Annexation		This anticipated reorganization involves annexation of approximately 17 unincorporated acres to the City of Escondido. The reorganization would facilitate connectivity to public wastewater service and in doing so accommodate the proposed development of approximately 200 residential units on the affected territory. The entire project lies within the City of Escondido sphere of influence. Complete application is pending.
	Pending	"Pasqual Heights – Touchstone Communities" - City of Escondido: Annexation		This anticipated out-of-agency service agreement involves approximately 10.4 unincorporated acres to the City of Escondido. The OAS would facilitate connectivity to public wastewater service and in doing so accommodate the proposed development of a 42-Single- Family unit subdivision within the affected territory. The entire project lies within the City of Escondido sphere of influence although not contiguous to the established service area boundary. Complete application and letter of request via the City is pending.

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AGENDA REPORT
Consent | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Keene Simonds, Executive Officer
Priscilla Mumpower, Assistant Executive Officer

SUBJECT: **2025-2026 Workplan Status**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will receive a workplan update on the 30 projects scheduled for 2025-2026. One project is complete — establishing an alternative membership organization serving San Diego and partnering LAFCOs. Another 16 projects are underway with high-priority municipal service reviews on wholesale water service providers, healthcare districts, and the Carlsbad region tentatively scheduled for noticed hearings beginning February 2026. Staff recommends the Commission receive and file the update with opportunity for discussion as needed.

BACKGROUND

San Diego LAFCO adopted its current fiscal year workplan at a public hearing in May 2025. The workplan includes 30 special projects divided into two distinct categories – statutory and administrative – with priority assignments established by the Commission.

DISCUSSION

This item provides San Diego LAFCO with an update on the special projects approved as part of the 2025–2026 Workplan. The attached status report lists all 30 projects and indicates

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that eight of the ten high-priority projects are substantively underway. Additional details on the status of all 10 high-priority projects follow.

Priority No. 1a | Municipal Service Review: Wholesale Water Service Providers
This study evaluates the performance and governance of the region's two principal wholesale water agencies — the San Diego County Water Authority (CWA) and the Metropolitan Water District of Southern California (MET). The review is intended to assess service efficiency, governance, and financial standing relative to regional demands, with a focus on capturing real-time operational adjustments in staff analysis. The project is being led by LAFCO staff with consultant support, and an administrative draft is anticipated for Commission review in Spring 2026.

Priority No. 1b | Municipal Service Review: Healthcare Districts
This service-specific study reviews the four healthcare districts serving San Diego County — Fallbrook, Grossmont, Tri-City, and Palomar. The study serves as a follow-up to the 2015 MSR and evaluates governance, service delivery, and financial performance relative to best practices. The project is being prepared by LAFCO staff with consultant support, with an administrative draft anticipated for Commission review in Spring 2026.

Priority No. 3 | Municipal Service Review: SANDAG
This study evaluates SANDAG's core regional functions — transportation planning, housing coordination, and climate adaptation — through a hybrid municipal service review and special study framework. The review aims to assess agency performance, transparency, and data-sharing practices in advancing regional goals.[1] LAFCO staff and consultant Bill Fulton are leading the effort, with an administrative draft to be shared with SANDAG staff for technical review by early 2026.

Priority No. 4a | Municipal Service Review: City of Carlsbad + Carlsbad MWD
This region-specific MSR examines governance, service delivery, and fiscal accountability within the City of Carlsbad and the Carlsbad Municipal Water District. The review assesses operational efficiency, governance structure, and long-term financial sustainability. Administrative drafts have been distributed for agency review, with a final draft anticipated for Commission consideration in February 2026.

Priority No. 4b | Municipal Service Review: City of Encinitas + Overlapping Districts
This accompanying MSR evaluates the City of Encinitas and its overlapping districts – Olivenhain Municipal Water District, Leucadia Wastewater District, and San Dieguito Water District. The analysis focuses on agency performance relative to service demand, infrastructure capacity, and regional coordination. Administrative drafts are under technical review, with Commission consideration anticipated in early 2026.

[1] At the September 18, 2025 Cities Advisory Committee meeting, staff presented an update on the SANDAG MSR. The Committee took action to form an ad hoc working group to assist with development of the MSR and emphasized the importance of evaluating SANDAG's data development and data-sharing practices.

Priority No. 6a | Municipal Service Review: City of San Marcos + Overlapping Districts
This regional study evaluates the City of San Marcos and its overlapping service providers: Vallecitos Water District, San Marcos Fire Protection District, and Vista Irrigation District. The review is intended to assess agency performance, service capacity, and coordination opportunities across jurisdictional boundaries. Study initiation is scheduled to begin in early 2026.

Priority No. 6b | Municipal Service Review: City of Vista + Buena SD
This accompanying MSR evaluates the City of Vista and Buena Sanitation District (SD), with emphasis on wastewater service delivery and Buena SD's role as a subsidiary district under City governance. The review will assess overall agency performance, fiscal accountability, and potential efficiencies or coordination opportunities between the two entities. Study initiation is anticipated to begin in early 2026.

Priority No. 8 | White Paper on Homeless Services
This informational report evaluates the scale, organization, and governance of homeless services throughout San Diego County. Its intent is to assess existing service gaps and explore governance frameworks that could improve coordination within the regional continuum of care system. Staff is working with consultant Technical Assistance Collaborative to map the ecosystem of homeless services and analyze related performance metrics, with a draft report anticipated for Commission presentation in Spring 2026.

Priority No. 9 | White Paper on Public Recreation at City Reservoirs
This informational report assesses public recreation opportunities at City of San Diego-owned reservoirs located within unincorporated areas of the County. The project aims to evaluate alternative governance and partnership models that could enhance public access and inter-jurisdictional coordination. A contract is anticipated to be executed by November 2025, with project work commencing shortly thereafter.

Priority No. 10 | Sustainable Agricultural Lands Conservation (SALC) 2.0
This multi-year planning grant seeks to build on the findings of SALC 1.0 by quantifying economic challenges facing small-scale farming operations in San Diego County. The project aims to develop countywide policy recommendations that bridge the economic gap between marginal and sustainable farms and strengthen agricultural viability. Development of the Strategic Plan (Task 5 of 6 under the grant agreement) is underway, with final deliverables scheduled for completion in May 2026.

ANALYSIS

None.

RECOMMENDATION

It is recommended San Diego LAFCO receive and file the progress report. This recommendation is consistent with Alternative Action One in the proceeding section.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO:

Alternative One (recommended):
Receive and file the progress report on the adopted workplan.

Alternative Two:
Continue the item to the next regular meeting and provide directions to staff as needed.

Alternative Three:
Take no action.

PROCEDURES

This item has been placed on San Diego LAFCO's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation as provided unless otherwise specified by the Commission.

On behalf of the Executive Officer,



Priscilla Mumpower
Assistant Executive Officer

Attachment:

1) 2025-2026 Workplan Status

Priority	Tier	Type	Project	Description
Ongoing	…	Statutory	Applicant Proposals and Requests	Prioritize resources to address applicant proposals and related requests
Ongoing	…	Administrative	Targeted LAFCO Presentations	Coordinate timely public outreach; emphasis on informing stakeholders ahead of MSR work
Ongoing	…	Statutory	Workplan and Budget Management	Actively manage the workplan and budget resources with regular updates to the Commission

Priority	Tier	Type	Project	Description	Status
1a	Highest	Statutory	MSR | Wholesale Water Service Providers	Service-specific study on principal wholesale water suppliers – CWA (comprehensive) + MET (abbreviated)	
1b	Highest	Statutory	MSR | Healthcare Districts	Service-specific study of the four healthcare districts in San Diego County; addendum expected	
3	Highest	Statutory	MSR | SANDAG	Agency-specific study of SANDAG (transportation, housing planning, + climate adaption planning)	
4a	Highest	Statutory	MSR | Carlsbad-Encinitas Region I: Carlsbad	Region-specific study on City of Carlsbad + Carlsbad MWD	
4b	Highest	Statutory	MSR | Carlsbad-Encinitas Region II: Encinitas	Region-specific study on City of Encinitas + special districts (Olivenhain, Leucadia, San Dieguito)	
6a	High	Statutory	MSR | Vista-San Marcos Region I: San Marcos	Regional MSR on City of San Marcos + special districts (Vallecitos, San Marcos FPD, Vista ID)	
6b	High	Statutory	MSR | Vista-San Marcos Region II: Vista	Regional MSR on City of Vista + Buena SD	
8	High	Administrative	White Paper | Homeless Services	Evaluate the scope-scale of homeless services in SD County + potential governance options	
9	High	Administrative	White Paper | Public Recreation @ City Reservoirs	Assess public recreation at City of SD's unincorporated reservoirs + potential governance alternatives	
10	High	Administrative	SALC Planning Grant 2.0	Complete multi-year grant to inform + enhance small farming operations in SD County	
11a	High-Mid	Statutory	MSR | Solana Beach – Del Mar Region I: Cities	Region-specific study on mid coast I-5 municipalities (Solana Beach and Del Mar)	
11b	High-Mid	Statutory	MSR | Solana Beach – Del Mar Region II: Districts	Regional MSR on mid coast I-5 districts (Santa Fe ID + CSA 17)	
13	High-Mid	Administrative	Website Refresh + Content Expansion	Work with outside consultant to design and launch website refresh w/enhanced end-user features	
14	High-Mid	Statutory	MSR | San Diego Unified Port District	Agency-specific study of the Port (harbor, recreation, public safety, + community development)	
15	High-Mid	Statutory	Special Study | Oceanside SCHD	Prepare special study on SCHD detailing revenues/expenses + potential governance alternatives	
16	Mid	Administrative	Outside Audit | RFP + Selection	Prepare and circulate RFP and select new outside auditor beginning with FY2025 statements	
17	Mid	Administrative	Outside Audit | FY2025	Complete outside audit of financial statements for FY25 with supplemental information	
18	Mid	Administrative	Pilot Grant Program	Establish pilot program to explore grant opportunities to help fund special projects at LAFCO	
19	Mid	Administrative	Special Districts Advisory Committee	Provide administrative support to the SDAC and hold no less than three meetings in FY2026	
20	Mid	Administrative	Cities Advisory Committee	Provide administrative support to the CAC and hold no less than two meetings in FY2026	

Priority	Level	Type	Project	Description	Status
21	Mid-Low	Statutory	RCD Ad Hoc Committee: Part II	Complete part II of RCD boundary true ups to inform sphere updates for local RCDs	
22	Mid-Low	Statutory	MSR | South Coast Region I – Cities	Region-specific study on south coast Cities (Chula Vista, Coronado, Imperial Beach and National City)	
23	Mid-Low	Statutory	MSR | Healthcare Districts: Addendum	Address community healthcare needs and related resources + potential governance alternatives	
24	Mid-Low	Administrative	Alternative Membership Organization	Work with other LAFCOs to receive/provide ongoing education and legislative advocacy services	
25	Mid-Low	Administrative	Annual Local Agency Directory	Update and publish annual local agency directory subject to LAFCO oversight	
26	Low	Administrative	Legislative Proposal | UC Berkeley Report	Sponsor/facilitate legislation implementing UC report recommendations on LAFCO efficiencies	
27	Low	Administrative	Commissioner Onboarding	Create a digital toolkit for new Commissioners to help acclimatize to LAFCO	
28	Low	Administrative	Annual SOI-MSR Registry	Update and publish annual registry showing all recorded SOI and MSR actions	
29	Low	Statutory	Applicant Procedures	Update and streamline LAFCO application materials + establish related protocols	
30	Low	Administrative	Featured Work + Tutorial Videos	Produce videos featuring special projects as well as primers on LAFCO duties for online distribution	
	Bullpen	Statutory	MSR | City of San Diego	Agency-specific study and core municipal service functions (water, wastewater, public safety, etc.)	
	Bullpen	Statutory	White Paper | Community Choice	Evaluate the scope and scale of CCAs in SD County and connectivity to LAFCO duties and interests	
	Bullpen	Statutory	Outreach to Sunset/Melrose "Island"	Perform targeted outreach to the island between Oceanside + Vista to assess service needs + possible annexation interests	
	Bullpen	Administrative	Service + Fiscal Indicators	Develop online browser feature to depict service + fiscal indicators among local agencies in SD County	
	Bullpen	Administrative	Liaison with Local Tribes	Establish communication protocols with local tribes with respect to shared interests in regional services + CEQA consultations	
	Bullpen	Statutory	Morro Hills CSD Follow Up	Coordinate and/or otherwise facilitate discussions with County Sheriff to enhance traffic enforcement within the CSD	
	Bullpen	Statutory	Policy Review | Health + Safety Fee Reductions	Review options to revise existing fee reductions for proposals/requests involving public health or safety threats	
	Bullpen	Administrative	LAFCO Meeting Room	Explore opportunities to secure a dedicated LAFCO meeting room with scaled dais and A/V enhancements	
	Bullpen	Statutory	White Paper | Garbage + Landfill Services	Evaluate the scope and scale of garbage collection and disposal services in SD County	
	Bullpen	Statutory	Legislative Proposal | G.C. 56430	Sponsor and/or facilitate amendments establishing community engagement enhancements in MSR statute	
	Bullpen	Statutory	White Paper | School Districts	Evaluate scope and scale of school districts and their baseline capacities for reference in municipal service reviews	
	Bullpen	Statutory	Policy Review | Island Annexations	Consider options to define "substantially surrounded" and provide related mapping services	
	Bullpen	Administrative	LAFCO Workshop	Organize a special workshop for the Commission to discuss strategic objectives over the next five-year period	
	Bullpen	Administrative	Public Access Television	Establish public broadcasting LAFCO meetings on local government channels	
	Bullpen	Administrative	Procedural Flow Charts	Create user friendly flow charts for various LAFCO statutory processes for online publication	
	Bullpen	Statutory	Policy | Fee Schedule Update	Review and update fee schedule to sync with current costs and related considerations	
	Bullpen	Statutory	Policy | CEQA Guidelines	Review and update existing CEQA Implementation guidelines relative to current statute and best practices	
	Bullpen	Statutory	Disadvantaged Unincorporated Communities	Update DUC mapping designations (DUC) in San Diego County based on current census information	
	Bullpen	Administrative	County Planning Groups	Monitor regular meetings of the County's 28 Planning and or Sponsor Groups and directly engage as appropriate	
	Bullpen	Administrative	Local Agency Finder Tool	Develop online feature for users to enter address to identify all overlapping local jurisdictions (cities and districts)	
	Bullpen	Statutory	Policy | Commission Rule No. 4	Modernize Rule No. 4 and its provisions to regulate special districts' service functions and classes	
	Bullpen	Statutory	Special Study | Escondido + Rincon	Study options to consolidate (functional and political) the City of Escondido and Rincon del Diablo MWD	
	Bullpen	Statutory	White Paper | JPAs	Evaluate the status of JPA filings in SD County relative to LAFCO's task in SB 1261	
	Bullpen	Administrative	Policy | Cities Advisory Committee	Coordinate with CAD in updating bylaws and related procedures to sync with current interests/priorities	
	Bullpen	Statutory	Legislative Proposal | G.C. 56133	Sponsor/facilitate amendments to clarify LAFCOs' authority to determine out-of-agency exemptions in (e)	

Complete | Near Complete | Underway | Pending

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AGENDA REPORT
Consent | Information

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Meghan Traynor, Analyst I
Pat Bouteller, LAFCO Consultant

SUBJECT: **Legislative Report**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will receive a legislative update on bills affecting agency operations. Since October, the Governor signed three tracked bills (AB 339, SB 777, SB 489) plus one new bill of interest, SB 707. The report also updates LAFCO's workplan directive to pursue legislation addressing U.C. Berkeley study recommendations on empowering LAFCOs with new tools in extending water and wastewater services to underserved communities. Staff presents the item for information with opportunity for discussion as needed.

BACKGROUND

San Diego LAFCO staff monitors pending legislation affecting LAFCO operations per the workplan and coordinates with the Alliance of California LAFCOs (ACL) on legislative analysis and positions. The Legislature adjourned its 2025 session on September 13 following the September 12 bill passage deadline. The 2026 session convenes January 5.

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Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

DISCUSSION

San Diego LAFCO will receive a legislative update on proposals of interest since the October meeting. The Governor signed three tracked bills (AB 339, SB 777, SB 489) plus newly identified SB 707, all with material interest to LAFCOs. The report also updates the Commission's participation in the U.C. Berkeley legislative effort to strengthen LAFCO authority for facilitating orderly water and wastewater services to underserved communities and/or to mitigate public health threats. Staff presents the item for information with opportunity for discussion as needed.

Introduced Bills

This report follows the conclusion of the first year of the two-year legislative session. Approximately 2,300 bills were introduced with ten identified as having elevated interest to San Diego LAFCO due to their potential direct or indirect impacts on the Commission and the local agencies under its oversight. Of these, four bills (AB 448, AB 351, AB 810, and SB 740) did not advance out of their first house and must pass their house by January 31 2026 in the second legislative year or else become inactive. Two bills (AB 259 and AB 356) passed the first house and merit close monitoring by San Diego LAFCO in the second legislative year. Since the October 2025 legislative report, three bills (AB 339, SB 777, and SB 489) have been signed into law, and staff has identified an additional measure of interest, SB 707, which was also enacted. The ten bills of interest and their status are summarized below.

Bills of Interest:
Failed to Pass 1st House

- **AB 448 (Patel, Darshana)**
  Extend Loan Repayment for Palomar Healthcare District
  This bill is of local interest and authorizes the State Treasurer's Office to extend and, if necessary, restructure a previously issued bridge loan to Palomar Healthcare District. The Commission took a support position on this bill in June given the extension provides administrative flexibility for Palomar to meet repayment obligations while continuing to provide essential healthcare services – including operating the only emergency room within the Escondido-Valley Center region. No substantive amendments were made to the bill to date after it was re-referred to the Assembly Appropriations Committee.

- **AB 351 (McKinnor, Tina)**
  Campaign Contributions Involving Agency Officers
  This bill is of statewide interest and proposes to raise the contribution limit for agency officers involved in permit or license proceedings under the Political Reform Act from $500 to $1,500. It also provides for future adjustments tied to inflation, based on changes in the Consumer Price Index. Although not the target of the bill, it is possible certain LAFCO actions – such as OAS approvals – may apply. The bill failed to pass out of committee on April 30, 2025, with a motion for reconsideration granted.

- **AB 810 (Irwin, Jacqui)**
  Government Website and Email Address Domains
  Existing law requires that a local agency that maintains an internet website for use by the public to ensure that the internet website uses a .gov top-level domain or a .ca.gov second-level domain no later than January 1, 2029. This bill is of statewide interest and would extend the due date for compliance with this law for special districts, joint powers authorities (including San Diego LAFCO) to January 1, 2031, while maintaining the January 1, 2029, deadline for cities and counties. A hearing of the bill by the Assembly Appropriations Committee was postponed on May 23, 2025.

- **SB 740 (Rubio, Susan)**
  Municipal Wastewater Filings with LAFCOs
  This bill is of statewide interest and proposes extending the deadline for municipal wastewater agencies to notify LAFCOs of new or amended agreements related to stormwater management services from 30 days to 40 days. The intent is to provide agencies with additional administrative flexibility in meeting reporting requirements. The bill did not pass out of the Senate by the June 6th deadline.

Bills of Interest:
Transition to Two-Year Bills

- **AB 259 (Rubio, Blanca)**
  Open Meetings and Continued Access to Teleconferences
  This bill is of statewide interest and would extend the authorization for legislative bodies of local agencies – including LAFCOs – to use modified teleconferencing procedures during declared emergencies through January 1, 2030. It preserves existing requirements related to public notice and agenda posting while allowing remote participation under defined emergency conditions. San Diego LAFCO adopted a support position on March 2nd. The bill passed the Assembly and a hearing of the bill by Senate Committees on Local Government and Judiciary have been postponed with it now reverting into a two-year bill.

- **AB 356 (Patel, Darshana)**
  Healthcare Districts in Northern San Diego County
  This bill is of local interest and was initially introduced to establish a state-directed working group to assess healthcare access in northern San Diego County and focusing on the Palomar Healthcare District's service area. In response to the Commission taking a support-if-amended position, the bill has been updated to include LAFCO as one of the listed stakeholders and in doing so providing connectivity to the Commission's oversight of Palomar and current municipal service review activities. LAFCO Consultant Adam Wilson provided supportive testimony for the author in conjunction with her accepting the Commission's amendments. While the bill passed through the Assembly, amendments requested by other stakeholders are currently under review, with the author agreeing to transition to a two-year bill.

Bills of Interest:
Passed Legislature + Signed into Law

- **AB 339 (Ortega, Liz)**
  Local Public Employee Organizations: Notice Requirements
  This bill is of statewide interest and affects public agencies regulated by the Meyers-Milias-Brown Act. These agencies must provide recognized employee organizations with at least 60 days' written notice before issuing RFPs or quotes, or before renewing or extending contracts covering services within represented job classifications. San Diego LAFCO employees are not presently represented by a recognized employee organization though most agencies under its oversight have labor organizations.

- **SB 489 (Arreguín, Jesse)**
  Permit Streamlining Act
  This bill is of statewide interest and would improve the Permit Streamlining Act (PSA) by requiring all public agencies post online the information necessary for a housing development application to be deemed complete. The intent is to reduce costly delays in the permitting process and facilitate approval and construction of housing. LAFCO will be required to comply with these PSA requirements to post application information online for applications in connection with housing development projects. SB 489 would not apply any other provisions of the PSA to LAFCO approvals.

- **SB 707 (Durazo, María Elena)**
  Open Meetings: Meeting and Teleconference Requirements
  This bill is of statewide interest and makes various changes to the Ralph M. Brown Act (Brown Act), governing public meetings of local agencies. Beginning July 1, 2026, and through January 1, 2030, eligible legislative bodies will be required to allow remote public participation in their meetings. Additionally, before July 1, 2026, these bodies must, at a noticed public meeting, adopt a policy – in open session – addressing procedures for disruptions in telephonic or internet service during such meetings subject to these provisions. San Diego LAFCO currently offers remote public participation for its Commission and Advisory Committee meetings and will work with legal counsel to ensure full compliance prior to the July 1, 2026 effective date.

- **SB 777 (Richardson, Laura)**
  Expanding LAFCOs Role to Include Endowment-Funded Cemeteries
  This bill is of statewide interest and was initially introduced to require LAFCOs to identify local agencies to assume ownership and long-term maintenance responsibilities for abandoned (private) endowment-funded cemeteries, including title and fund transfers coordinated with the Cemetery and Funeral Bureau's procedures. In response to stakeholder feedback, the bill has been amended to remove direct mandates on LAFCOs and instead establish a state-convened working group with LAFCO participation – set to convene by March 1, 2026 – to evaluate the issue and develop policy recommendations.

U.C. Berkeley Proposal

A January 2024 UC Berkeley report by Professor Kristin Dobbin and PhD Candidate Justin McBride examined opportunities to strengthen LAFCOs' role in improving public water systems, particularly for disadvantaged communities. Building on these recommendations, San Diego LAFCO — along with Alameda, Butte, Napa, Orange County, and Sacramento LAFCOs — is refining proposed statutory amendments to authorize LAFCOs to initiate annexations or out-of-agency service extensions in prescribed circumstances to address critical community needs. A working group consisting of LAFCO staff and community stakeholders, including the Community Water Center, meets monthly to advance this effort and explore potential bill authors. Staff will provide updates as this effort progresses.

ANALYSIS

The 2025 legislative session produced substantive results of interest to San Diego LAFCO with four bills signed into law addressing employee relations procedures, housing application streamlining, remote public participation requirements, and cemetery oversight responsibilities. Two bills of particular interest to San Diego — AB 259 on emergency teleconferencing and AB 356 on healthcare access in northern San Diego County — remain active as two-year bills and will be monitored closely. SB AB 448, AB 351, AB 810, and SB 740 will be monitored to see if they pass out of their first house by the January 31 2026 legislative deadline, after which they will become inactive. Staff will continue tracking these legislative developments and implement compliance measures as needed, including adopting required policies for SB 707 before the July 1, 2026 effective date.

RECOMMENDATION

This item is presented to the Commission for information only.

ALTERNATIVES FOR ACTION

None.

PROCEDURES

This item has been placed on the Commission's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation unless otherwise specified by the Commission.

On behalf of the Executive Officer,



Meghan Traynor
Analyst I

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AGENDA REPORT
Consent | Information

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Priscilla Mumpower, Assistant Executive Officer
Erica Sellen, Commission Clerk

SUBJECT: **Report on Recent Committee Meeting |
Special Districts Advisory Committee's October 17, 2025 Meeting**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will receive a report on the most recent meeting of its Special Districts Advisory Committee held on October 17th. The report is in the form of draft minutes and is being presented for information only consistent with an earlier request by Commissioner MacKenzie.

BACKGROUND

Special Districts Advisory Committee

The Special Districts Advisory Committee (SDAC) was established in 1971 to help inform and advise the Commission on related topics. SDAC's role has actively evolved from its initial focus on just jurisdictional changes affecting special districts to now expand into LAFCO's planning duties, highlighted by the Commission's municipal service review program. The Committee includes 15 elected members drawn from the 57 eligible independent special districts in San Diego County. The current Chair and Vice Chair are Kim Thorner (Olivenhain Municipal Water District) and Jack Beebe (Fallbrook Public Utility District), respectively.

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Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

DISCUSSION

San Diego LAFCO will receive a report on the most recent meeting of its Special Districts Advisory Committee held on October 17th and hosted by South Bay Water. The report is in the form of the attached draft minutes and comports with a recent request by Commissioner MacKenzie for the Commission to receive timely updates on deliberations of its two standing agency committees—Special Districts and Cities.

ANALYSIS

None.

RECOMMENDATION

This item is presented to San Diego LAFCO for information only.

ALTERNATIVES FOR ACTION

None.

PROCEDURES

This item has been placed on San Diego LAFCO's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation unless otherwise specified by the Commission.

On behalf of the Executive Officer,



Priscilla Mumpower
Assistant Executive Officer

Attachment:

1) DRAFT: SDAC Meeting Minutes – October 17, 2025

DRAFT
SAN DIEGO COUNTY LOCAL AGENCY FORMATION COMMISSION
SPECIAL DISTRICTS ADVISORY COMMITTEE
SPECIAL MEETING
October 17, 2025

Sweetwater Authority's
Richard A. Reynolds Groundwater Desalination Facility
3066 N. 2nd Avenue, Hydro Station Room
Chula Vista, California 91910

1. 9:30 A.M. – CALL TO ORDER BY CHAIR

Chair Kimberly Thorner called the meeting to order at 9:33 a.m.

Chair Thorner welcomed new committee member, Tracy Largent with the Port of San Diego and thanked Hector Martinez hosting the meeting.

Item 1a
ROLL CALL

Chair Kimberly Thorner requested a roll call from the Committee Secretary.

Members Present:	Members Absent:
Chair Kimberly Thorner (Olivenhain MWD)	Jeff Egkan (North County FPD)
Vice Chair Jack Bebee (Fallbrook PUD)	Rachel Mason (Fallbrook Regional HD)
Ann Baldridge (RCD Greater San Diego County)	Joel Scalzitti (Helix WD)
Paul Bushee (Leucadia WWD)	
James Gordon (Deer Springs FPD)	
Tracy Largent (Port of San Diego)	
Albert Lau (Santa Fe ID)	
Hector Martinez (South Bay ID)	
Dave McQuead (Rancho Santa Fe FPD)	
Marty Miller (Vista ID)	
Mark Robak (Otay WD)	
Mike Sims (Bonita-Sunnyside FPD)	

The Committee Secretary confirmed a quorum with twelve members present. The following members of San Diego LAFCO staff were present at roll call: Executive Officer Keene Simonds; Assistant Executive Officer Priscilla Mumpower; Local Government Analyst II Michaela Peters; Local Government Analyst I Meghan Traynor; Communications Associate Aiden Velasquez; GIS Analyst Dieu Ngu; and Commission Clerk Erica Sellen serving as Committee Secretary. LAFCO Consultants Patrick Bouteller, Mike Stein, Tom Kennedy, and Adam Wilson were also present. Chris Palmer, Senior Public Affairs Field Coordinator, CSDA was also present.

Item 1b
PLEDGE OF ALLEGIANCE

Hector Martinez (South Bay Water) led the Pledge of Allegiance.

2. AGENDA REVIEW BY CHAIR

Chair Thorner asked the Executive Officer if there were requests to remove or rearrange items on the agenda. The Executive Officer stated no changes were needed to the agenda.

Chair Thorner noted the meeting will have a hard stop time of 11:30 a.m. so committee members may take a tour of the facility following the meeting.

3. OPEN EXPRESSION

Chair Thorner asked if there were any members of the public who wished to address the Committee on a germane topic that is not directly part of the agenda.

The Committee Secretary confirmed there were no pre-registered speakers and no live email comments.

4. CONSENT ITEMS

a) Approval of Meeting Minutes for July 18, 2025 (action)
The Committee considered draft summary minutes prepared for the last meeting held on July 18, 2025. Recommendation to approve as presented.

b) Progress Report on 2025-2026 Workplan (information)
The Committee received an update on the adopted workplan and activities related to the 30 special projects scheduled for 2025-2026. Information only.

c) Legislative Report (information)
The Committee received a report on legislation introduced this session relevant to San Diego LAFCO's regulatory and planning responsibilities. The item also provides an update on the Committee's interest and related San Diego LAFCO workplan direction to pursue legislation addressing recent recommendations in a U.C. Berkeley study. Information only, with the opportunity for the Committee to pull for discussion.

d) Update on Commission Action to Join Monterey LAFCO Amicus Brief (information)
The Committee received an update on San Diego LAFCO's recent action to join an amicus brief in support of Monterey LAFCO's appeal of a trial court decision with potential statewide implications. The Commission approved participation at its October 6th meeting and authorized contribution of up to $1,200. The brief, led by Monterey LAFCO and prepared by Nossaman LLP, seeks to affirm LAFCO decisions are governed by substantial evidence as provided under LAFCO law. Information only.

**

On motion by Paul Bushee (Leucadia WWD) and seconded by Dave McQuead (Rancho Santa Fe FPD), the Committee unanimously approved the Consent Calendar.

DRAFT

5. BUSINESS ITEMS

a) Updated Rolling Five-Year Study Schedule (information)

The Committee received a report on the Commission's rolling five-year study schedule. This update followed the Commission's action in October 2025 to roll the existing schedule forward and reset the coverage period from FY 2026 through FY 2030, and aligning the study schedule with the adopted workplan. Two notable adjustments are included: removal of the now-completed Oceanside regional review and addition of several new reviews. Consistent with prior practice, the first two years correspond to municipal service reviews authorized and funded in the adopted workplan, including the newly added review of the Port District. The final three years function as an advanced planning tool to signal long-term intentions and provide local agencies and the public with notice of upcoming reviews. Information only, with the opportunity to advance formal comments and/or recommendations to the Commission as needed.

Staff presentation provided by Assistant Executive Officer Priscilla Mumpower.

Chair Thorner proceeded to invite questions and/or comments from the Committee.

No discussion. No action.

b) Update on High Priority Project | Municipal Service Review on Wholesale Water Agencies in San Diego County (discussion)

The Committee received an update on San Diego LAFCO's municipal service review (MSR) of wholesale water agencies in San Diego County—one of ten high-priority projects in the adopted 2025–2026 workplan. The study includes a comprehensive review of the San Diego County Water Authority (CWA) and a proportional review of the Metropolitan Water District of Southern California (MET). Discussion only, with an opportunity for the Committee to provide input on interests or priorities related to wholesale water service delivery and governance on behalf of special districts in San Diego County.

Staff presentation provided by Assistant Executive Officer Priscilla Mumpower.

Chair Thorner suggested having discussions on each of the four themes presented by the Assistant Executive Officer. Chair Thorner proceeded to invite questions and/or comments from the Committee.

General discussion from several Committee members followed covering the four themes including 1) governance and accountability, 2) potable reuse coordination, 3) defining service adequacy, and 4) encouraging signs. No action.

c) Update on Sustainable Agricultural Lands Conservation Grant (SALC 2.0) (discussion)

The Committee received update on the Commission's ongoing Sustainable Agricultural Lands Conservation (SALC) planning grant, known as "SALC 2.0." This project is being conducted in partnership with the County of San Diego's Planning and Development Services and builds on findings from the initial SALC grant to analyze economic challenges facing small-scale agricultural operations and identify policy solutions. SALC 2.0 is currently in its fifth phase to develop a strategic plan for incentives, technical assistance, regulatory

DRAFT

BUSINESS ITEMS CONTINUED…

Item 5c Continued…
improvements, and other support mechanisms for small-scale agriculture. Staff seeks Committee input on two key topics: incorporating agricultural analysis into the municipal service review program and establishing a regional working group to promote affordable water access for farmers and potential special district participation.

Staff presentation provided by Local Government Analyst II Michaela Peters.

Chair Thorner proceeded to invite questions and/or comments from the Committee.

General discussion followed. No action.

d) Workplan Update on High-Mid Priority Project | San Diego LAFCO Website Refresh + Content Expansion (information)

Due to time constraints, Chair Thorner pulled this agenda item, and it was not heard by the Committee.

e) Introduction | San Diego Unified Port District + Related Activities (information)
The Committee received an introduction to the San Diego Unified Port District. This introduction follows recent actions by San Diego LAFCO to formally include the Port as a special district under its oversight. As part of this action, the Port is now contributing an annual apportionment to LAFCO and is featured in the FY 2025–2026 workplan through the initiation of an inaugural Municipal Service Review. Information only, with an opportunity to provide feedback.

Tracy Largent, Chief Financial Officer/Treasurer of the Port, provided the Committee with an overview of the Port's mission, governance, and key activities relevant to special districts within San Diego County.

General discussion followed. No action.

f) Update: Development of Weighted Water Rate Comparison Formula (discussion)
The Committee received a verbal report on the development of a weighted water rate comparison formula being prepared in collaboration with consultant Tom Kennedy. The formula is intended for use in upcoming Municipal Service Reviews (MSRs) to enhance the evaluation of agencies' water rates. The update will highlight progress to date and next steps in incorporating factors such as topography and infrastructure variations among agencies. Discussion and feedback only.

Staff presentation provided by LAFCO Consultant Tom Kennedy.

Chair Thorner proceeded to invite questions and/or comments from the Committee.

General discussion followed. No action.

DRAFT

6. COMMITTEE MEMBER REPORTS

None.

7. EXECUTIVE OFFICER REPORT

Executive Officer Keene Simonds asked the Assistant Executive Officer to give an update on the Committee's Call for Nominations.

The Committee Secretary noted nominations are due no later than 5:00 p.m. on Friday, October 31, 2025.

8. ADJOURNMENT

With no further business, the Special Districts Advisory Committee meeting was adjourned at 11:47 a.m.

Attest:

Erica Sellen
Committee Secretary

DRAFT

DRAFT

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AGENDA REPORT
Consent | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Holly O. Whatley, Commission Counsel

SUBJECT: **Designation of Labor Negotiators**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider designating its labor negotiators for purposes of reviewing – and negotiating if warranted – the salary and benefits of the Executive Officer as part of the annual performance review. Consistent with policy and practice, it is recommended the Commission formally designate Chair Whitburn, Vice Chair Willis, and Commissioner Becker as its negotiators in step with their role as the Executive Officer Compensation Committee.

DISCUSSION

The Brown Act, the State's open meeting law, authorizes LAFCO to discuss its Executive Officer's compensation and benefits in closed session. "However, prior to the closed session, the legislative body of the local agency shall hold an open and public session in which it identifies its designated representatives" who will negotiate on behalf of LAFCO (Gov. Code, § 54957.6, subd. (a).) LAFCO's internal rules establish a procedure for negotiating the Executive Officer's compensation and benefits. Under LAFCO Rule No. 6.20(6)(b), "The Executive Officer Compensation Committee shall periodically review and rate the performance of the Executive Officer and make recommendations to the full Commission for any adjustments to the Executive Officer's compensation." LAFCO Rule No. 6.20(6)(a) states:

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

Paloma Aguirre, County of San Diego
Joel Anderson, County of San Diego
Monica M. Steppe, Alt., County of San Diego
Kristi Becker, City of Solana Beach
Dane White, City of Escondido
John McCann Alt., City of Chula Vista
Chair Stephen Whitburn, City of San Diego
Marni von Wilpert, Alt., City of San Diego
Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

> "The Executive Officer Compensation Committee shall consist of three members of the Personnel Committee as provided under Rule No. 1.11 with the option of the Chair to add a fourth member at his or her discretion." LAFCO Rule No. 1.11 reads, "The Commission establishes the Personnel Committee to review matters relating to the Personnel Rules outlined in Section 6. The Committee shall be composed of three members of the Commission consisting of the Chair, Vice Chair, and Immediate Past Chair. The Chair shall make an appointment to fill the Immediate Past Chair seat on the Personnel Committee should the Immediate Past Chair no longer be on the Commission."[1]

Therefore, consistent with the Brown Act and LAFCO Rule Nos. 1.11 & 6.20, LAFCO must designate in open session its Chair, Vice Chair, and Commissioner Becker as labor negotiators. The Board may also appoint a fourth member, at the discretion of Chair Whitburn.

RECOMMENDATION

It is recommended San Diego LAFCO designate by minute order Chair Whitburn, Vice Chair Willis, and Commissioner Becker to serve as labor negotiators to negotiate the Executive Officer's salary and benefits.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO through a single motion:

Alternative One (recommended):
Designate by minute order Chair Whitburn, Vice Chair Willis, and Commissioner Becker to serve as labor negotiators to negotiate the Executive Officer's salary and benefits.

Alternative Two:
Continue the agenda item to another meeting.

Respectfully,

Holly O. Whatley
General Counsel

[1] Chair Whitburn has appointed Commissioner Becker as the third member of the Personnel Committee, filling the seat previously held by former Commissioner and Immediate Past Chair Jim Desmond.

5i

AGENDA REPORT
Consent | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Priscilla Mumpower, Assistant Executive Officer
Aiden Velasquez, Communications Associate

SUBJECT: **Amendment to Fee Schedule | Authorization to Accept Online Payments**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider amending its fee schedule to authorize receipt of online payments via credit card and electronic bank transfer. This action completes a holdover from the FY2024–2025 workplan to establish procedures for accepting applicant fees through a third-party payment processor. Staff has identified QuickBooks Payments as the preferred solution due to its compatibility with the Commission's existing accounting platform and comparatively low processing fees. Authorization and a corresponding amendment to the adopted fee scheduled are required before implementation. Staff recommends approval.

BACKGROUND

Adopted Fee Schedule

San Diego LAFCO's fee schedule was updated in February 2019. The schedule establishes fixed application fees based on proposal type, at-cost fees for unique jurisdictional changes (e.g., formations, consolidations, dissolutions, and incorporations), and a Municipal Service Review maintenance fee equal to 5% of the application fee, with a minimum cost of $6,400 for a single jurisdictional change. Currently, the schedule authorizes only check payments.

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Eileen Delaney, Alt., General Public

Earlier Workplan Directive

San Diego LAFCO's FY2024–2025 workplan included 30 special projects divided into statutory and administrative categories with Commission-established priorities. One administrative project involved establishing procedures to allow applicants to pay LAFCO via credit card or electronic bank transfer, eliminating the need for physical checks. Work was substantially completed before fiscal year-end but paused due to higher priorities, with presentation to the Commission scheduled for early FY2025-2026.

DISCUSSION

This item is for San Diego LAFCO to consider formal action to amend the adopted fee schedule to authorize online payments via credit card and electronic bank transfer. The proposed action has been under evaluation by LAFCO staff since its placement in the prior fiscal year workplan and informed by researching potential integrated payment processors and evaluating implementation requirements. The evaluation led to consideration of two principal options: QuickBooks Payments and PayPal. As further detailed, staff believes QuickBooks Payments is the most practical option for LAFCO due to its integration with the Commission's existing accounting system and comparatively low processing fees. Additional discussion on implementation and related considerations follow.

- **How it Works**

  LAFCO links its existing QuickBooks account to the integrated QuickBooks Payments program. The payment process follows these four steps:

  1. **Invoice Creation** – LAFCO generates an invoice within its QuickBooks account and uses the integrated payment function to send a PDF version to the responsible party by email, including a secure "Pay Now" link.

  2. **Payment Initiation** – The responsible party receives the invoice and clicks the "Pay Now" link, which opens QuickBooks' secure payment portal where they select their preferred payment method.

  3. **Payment Confirmation** – Once completed, QuickBooks immediately confirms payment on-screen and by email to the responsible party.

  4. **Automatic Recording** – The transaction automatically posts in LAFCO's QuickBooks account, marking the invoice as Paid and recording the payment and any associated processing fee.

- Types of Payments it Accepts

  QuickBooks Payments allows for three types of online payments:

  - ACH (automatic clearinghouse) bank transfers
  - Credit and debit cards
  - Digital wallets

  Cards and digital wallets include the following sources: Visa, Mastercard, Discover, American Express, Apple Pay, PayPal, and Venmo.

- **Deposit Time, Processing Fees, and Disputes**

  The deposit speed (or the amount of time it takes for customer payments to reach the San Diego LAFCO bank account) varies per payment type. ACH Bank Transfers may take between one to five business days to be deposited while cards and digital wallets will take approximately one business day.

  Processing fees established by QuickBooks will be passed directly to the applicant. Applicable processing fees vary by transaction, including 1.0% for ACH bank transfers and 2.99% for credit/debit card or digital wallet transactions. An example of these fees relative to LAFCOs fee schedule is footnoted.[1]

  Disputed charges will appear in the form of Chargebacks. This would occur if an applicant disputed a charge with their bank, the bank approved the dispute and then issued a chargeback notice. These may be disputed through evidence of valid services and payments. If the bank determines the Chargeback is valid, funds will be lost. If the Chargeback is ruled invalid, funds will not be affected.

- **Other Considerations**

  San Diego LAFCO has utilized QuickBooks as its preferred accounting software since 2016. The QuickBooks Payments add-on represents a practical financial tool supported by a trusted provider. QuickBooks employs multiple measures to maintain privacy and security, including multi-factor authentication and data encryption, ensuring only authorized users can access QuickBooks servers and all stored information is securely encrypted.

The proposed update is shown in track-changes format as provided in Attachment Two.

[1] A CEQA-exempt jurisdictional change proposal with a $6,405 base fee (e.g., annexation) would incur an additional $64.05 for ACH or about $191.50 for card or digital wallet payment. Each additional change request (e.g., concurrent detachment or related sphere amendment) adds $4,163.25 to the base fee, with the same percentage-based charges applied—bringing total processing fees (for two jurisdictional changes) to $105.70 for ACH or $312.30 for card/digital payments.

ANALYSIS

The proposed amendment to San Diego LAFCO fee schedule to authorize acceptance of online payments directly responds to increasing interest by applicants to make it easier and more convenient to expedite proposal processing and related requests. Beyond convenience, this authorization separately helps to address equity by enabling applicants without immediate cash reserves to utilize credit options for managing payment timing, and ensuring financial constraints do not delay legitimate proposals. Further, no fiscal impact to LAFCO is anticipated given it is proposed the processing fees by QuickBooks Payment will be passed directly to the applicant. Applicants may continue to submit payment by check should they choose not to utilize the online payment options.

RECOMMENDATION

Staff recommends San Diego LAFCO approve the proposed amendment to the adopted fee schedule authorizing online payments consistent with Alternative One in the following section.

ALTERNATIVES FOR ACTION

The following alternatives are available to San Diego LAFCO:

Alternative One (recommended):
Approve the proposed amendment to the adopted fee schedule as provided in Attachment Two with any desired changes and set an immediate effective date.

Alternative Two:
Continue the item to the next regular meeting and provide directions to staff as needed.

Alternative Three:
Take no action.

PROCEDURES

This item has been placed on San Diego LAFCO's agenda as part of the consent calendar. A successful motion to approve the consent calendar will include taking affirmative action on the staff recommendation as provided unless otherwise specified by the Commission.

On behalf of the Assistant Executive Officer,



Aiden Velasquez
Communications Associate

Attachments:

1) Current Fee Schedule
2) Proposed Fee Schedule Update

SAN DIEGO COUNTY LOCAL AGENCY FORMATION COMMISSION

Regional Service Planning | Political Subdivision of the State of California

FEE SCHEDULE

Standard Jurisdctional Changes

Standard jurisdictional changes include (a) annexations, (b) detachments, (c) latent power establishments, and (d) service power divestitures

	LAFCO is Responsible Agency			LAFCO is Lead Agency Plus Consultant Costs		
	Exemption	Initial Study	Impact Report	Exemption	Initial Study	Impact Report
Single Jurisdictional Change						
- With Full Consent | No Protest Hearing	$ 6,405.00	$ 7,045.50	$ 7,686.00	$ 6,405.00	$ 8,326.50	$ 10,248.00
- Without Full Consent | Protest Hearing	$ 8,326.50	$ 8,967.00	$ 9,607.50	$ 8,326.50	$ 10,248.00	$ 12,169.50
Each Additional Jurisdictional Change						
- With Full Consent | No Protest Hearing	$ 4,163.25	$ 4,579.58	$ 4,995.90	$ 4,163.25	$ 5,412.23	$ 6,661.20
- Without Full Consent | Protest Hearing	$ 5,412.23	$ 5,828.55	$ 6,244.88	$ 5,412.23	$ 6,661.20	$ 7,910.18

Fees for all standard jurisdictional changes are fixed and represent reasonable cost estimates for the underlying action(s) based on a number of predetermined staff hours to complete. These fees are non-refundable and – while not typical or expected – may be augmented by one or more deposits when additional time is needed beyond the predetermined staff hour allocation as determined by the LAFCO Executive Officer.

Other Jurisdictional Changes

Special District Formation	Billed for time and material starting with a $ 9,150 deposit to cover the first 75 hours
Special District Consolidation or Dissolution	Billed for time and material starting with a $12,200 deposit to cover the first 100 hours
Incorporation	Billed for time and material starting with a $24,400 deposit to cover first 200 hours

Fees for other boundary changes are at-cost. These fees require an initial and refundable deposit to cover staff time based on the hourly composite rate. Additional deposits may be required as determined by the Executive Officer.

Other Requests and Charges

Outside Service Extensions	
- Exemption	$ 1,921.50
- Initial Study	$ 2,113.65
- Impact Report	$ 2,305.80
Sphere of Influence Amendments	Billed at their corresponding rate for standard boundary changes; applies to expansions, reductions, establishments, and eliminations
Municipal Service Reviews	Billed for time and material starting with a $12,200 deposit to cover the first 100 hours
Reconsideration of a Commission Determination	$ 2,600.00
Time Extension to Complete Proceedings	$ 610.00
General Staff Research	$ 122.00 per hour; first four hours of any general research project waived
Scheduling a Special Meeting	$ 3,210.00
Postage, Mail Supplies, Photocopies, Etc.	at cost

Common Third Party Charges

County of San Diego Clerk-Recorder	$ 50.00
California Department of Fish and Game	
- Filing for a Negative Declaration	$ 2,916.75
- Filing for a Mitigated Negative Declaration	$ 2,916.75
- Filing for an Environmental Impact Report	$ 4,051.25
State Board of Equalization	
- 0.0 to 1.0 acre	$ 300.00
- 1.0 to 5.0 acres	$ 350.00
- 6.0 to 10.0 acres	$ 500.00
- 11.0 to 20.0 acres	$ 800.00
- 21.0 to 50.0 acres	$ 1,200.00
- 51.0 to 100.0 acres	$ 1,500.00
- 100.0 acres or more	$ 2,000.00

Implementing Policies

1 Proposals and requests subject to this fee schedule will be deemed incomplete until the appropriate fee has been received by LAFCO.

2 All additional staff time required to process proposals or requests subject to this fee schedule beyond the coverage of the initial fixed fee or collected at-cost deposit will be billed at a composite hourly rate of $122.00.

3 Applicants with proposals or requests subject to this fee schedule requiring consultants to prepare environmental or other technical documents will be responsible for all direct costs therein and will be required to provide a dedicated deposit as determined by the Executive Officer.

4 The Executive Officer may stop work on any proposal or request subject to this fee schedule until receipt of a requested fee or deposit.

5 The Commission may reduce or waive fees if a financial hardship is demonstrated and/or if the proposal or request is in response to a LAFCO condition or recommendation. Requests must be made in writing. Pre authorized reductions follow.

a) Jurisdictional changes that include a qualifying city annexation of an entire "island" under Government Code 56375.3 shall receive a 50% fee reduction relative to the charges normally incurred under the fee schedule. Additional reductions or waivers require Commission approval.

b) Jurisdictional changes that include a qualifying city annexation of a disadvantaged unincorporated community under Government Code 56375(a)(8) shall receive a 50% fee reduction relative to the charges normally incurred under the fee schedule. Additional reductions or waivers would require Commission approval.

c) Jurisdictional changes initiated in response to an existing or pending septic or well failure shall receive a 75% fee reduction relative to the charges normally incurred under the fee schedule. Qualifying proposals mush have 100% written consent of all affected landowners and confirmation from the County Environmental Health Department verifying an existing or pending failure exists. Additional reductions or waivers would require Commission approval.

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SAN DIEGO COUNTY LOCAL AGENCY FORMATION COMMISSION

Regional Service Planning | Political Subdivision of the State of California

FEE SCHEDULE

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Sphere of Influence Amendments	Billed at their corresponding rate for standard boundary changes; applies to expansions, reductions, establishments, and eliminations

Common Third-Party Charges

State Board of Equalization	
0.0 to 1.0 acre	$ 300.00
1.0 to 5.0 acres	$ 350.00
6.0 to 10.0 acres	$ 500.00
11.0 o 20.0 acres	$ 800.00
21.0 to 50.0 acres	$ 1,200.00
51.0 to 100.0 acres	$ 1,500.00
100.0 acres or more	$ 2,000.00

County of San Diego Clerk-Recorder	$ 50.00

California Department of Fish and Game	
Filing for a Negative Declaration	$ 2,916.75
Filing for a Mitigated Negative Declaration	$ 2,916.75
Filing for an Environmental Impact Report	$ 4,051.25

Payment Options

San Diego LAFCO accepts payments by check or through QuickBooks Payments using a credit card, debit card, digital wallet, or ACH bank transfer.

For questions regarding payment procedures or to obtain further instructions, please contact the analyst assigned to your proposal or the San Diego LAFCO office direct line at (619) 321-3380.

Important Notes:

1. Payments made by check must be made payable to San Diego LAFCO and mailed to: 2550 Fifth Avenue, Suite 725, San Diego, California 92103-6624.

2. Payments made through QuickBooks Payments are subject to third-party processing fees established by QuickBooks and passed directly to the applicant. Applicable fees include 1.0% for ACH bank transfers and 2.99% for credit/debit card or digital wallet transactions. A secure payment link will be provided upon request and following invoicing.

3. *Payments related to the State Board of Equalization are not eligible for electronic processing and must be submitted to San Diego LAFCO by check made payable to the State Board of Equalization.*

1. Proposals and requests subject to this fee schedule will be deemed incomplete until the appropriate fee has been received by LAFCO.

2. All additional staff time required to process proposals or requests subject to this fee schedule beyond the coverage of the initial fixed fee or collected at-cost deposit will be billed at a composite hourly rate of $122.00.

3. Applicants with proposals or requests subject to this fee schedule requiring consultants to prepare environmental or other technical documents will be responsible for all direct costs therein and will be required to provide a dedicated deposit as determined by the Executive Officer.

4. The Executive Officer may stop work on any proposal or request subject to this fee schedule until receipt of a requested fee or deposit.

5. The Commission may reduce or waive fees if a financial hardship is demonstrated and/or if the proposal or request is in response to a LAFCO condition or recommendation. Requests must be made in writing. Preauthorized reductions follow.

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c) Jurisdictional changes initiated in response to an existing or pending septic or well failure shall receive a 75% fee reduction relative to the charges normally incurred under the fee schedule. Qualifying proposals must have 100% written consent of all affected landowners and confirmation from the County Environmental Health Department verifying an existing or pending failure exists. Additional reductions or waivers would require Commission approval.

6a

AGENDA REPORT
Public Hearing | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Keene Simonds, Executive Officer
Michaela Peters, Local Government Analyst II

SUBJECT: **Proposed "AJX Homes LLC – Carmichael Drive Reorganization" | Annexation to City of La Mesa and Concurrent Detachments from San Miguel Consolidated FPD and CSA 135 with Related Actions (File No. RO22-04)**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider a reorganization proposal from AJX Homes LLC to annex a 0.27-acre parcel into the City of La Mesa to establish public wastewater service. The proposal includes concurrent detachments from San Miguel Consolidated Fire Protection District (FPD) and County Service Area (CSA) No. 135. The affected territory – currently developed with an unoccupied single-family residence at 9365 Carmichael Drive in unincorporated Valle de Oro – is adjacent to La Mesa. Staff recommends conditional approval with confirming sphere of influence amendments. Staff further recommends waiver of protest proceedings, proceed without a new municipal service review per Policy L-106, and find the reorganization and sphere amendments exempt under State CEQA Guidelines Sections 15319(a) and 15061(b)(3), respectively.

BACKGROUND

Applicant Request

Landowner AJX Homes LLC (Lillian Trujillo) submitted a reorganization proposal to San Diego LAFCO in May 2023 for the principal purpose of annexing 0.27 acres of unincorporated territory to the City of La Mesa. Concurrent actions to detach the affected territory – consisting of one legal parcel developed with a single-family residence at 9365 Carmichael

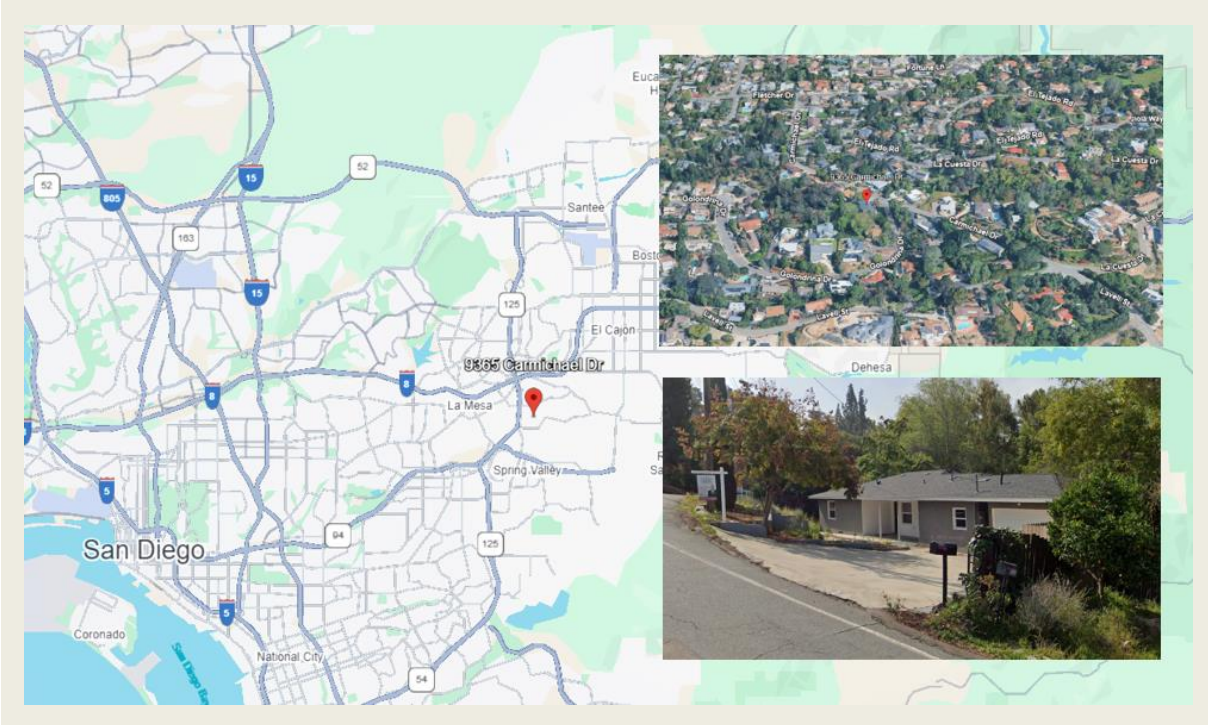
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Drive – from CSA No. 135 (regional communications) and San Miguel FPD (fire, rescue, and emergency medical) are also proposed. The County of San Diego Assessor's Office identifies the subject parcel as 495-335-05.

Regional Setting

The affected territory is located in east San Diego County within the unincorporated community of Valle de Oro, east of State Highway 125 and north of State Highway 94. Principal access is provided by Bancroft Drive via Fletcher and Carmichael Drives. The territory lies within County Supervisorial District 4 (Monica M. Steppe), Assembly District 75 (Carl DeMaio), and Senate District 39 (Akilah Weber Pierson). An aerial map follows, with a detailed map showing the parcel and La Mesa's jurisdictional boundary provided as Attachment One.



Google Earth

Subject Agencies

The proposed reorganization filed with San Diego LAFCO involves three subject agencies: City of La Mesa, San Miguel FPD, and CSA No. 135.[1] A summary of the subject agencies in terms of population, size, functions, and financial standing follows.

[1] State law defines "subject agency" to mean any district or city for which a change of organization or reorganization is proposed.

- **City of La Mesa** was incorporated in 1912 and operates under a council-manager form of government. The estimated population in La Mesa is 59,996 across a jurisdictional boundary spanning 5,824 acres (9.1 square miles). La Mesa is largely a full-service municipality, directly providing community planning, parks and recreation, police, and wastewater services. Notable exceptions involve water and integrated fire protection, rescue, and emergency medical services, which are provided by Helix Water District and Heartland Fire and Rescue Authority, respectively. LAFCO last updated La Mesa's sphere of influence in 2008 with a same-as-agency designation. The last completed audit covers 2022-2023 and shows La Mesa's net position totaling $180.5 million, reflecting a 13.6% increase over three prior fiscal years. The ending balance within the General Fund totals $69.8 million with $11.4 million committed as reserves and $53.1 million unassigned. The overall balance of $69.8 million equals 11.0 months of actual General Fund operating expenses in 2022-2023.

- **San Miguel Consolidated FPD** is an independent special district formed in 1987 with an estimated 128,665 residents across 29,728 acres (46.5 square miles). A directly elected seven-member Board governs San Miguel FPD and its three active and integrated municipal functions: fire protection, rescue, and emergency medical. The jurisdictional boundary covers Spring Valley, Grossmont, and Bostonia – the latter being geographically separate from the remainder of the jurisdictional boundary.[2] LAFCO last reviewed San Miguel FPD's sphere of influence in 2017 and excluded 468 jurisdictional acres (in various areas including Jamul and Crest). The last completed audit covers 2023-2024 and shows San Miguel FPD's net position totaling ($18.7) million, an improvement of 0.9% over the prior fiscal years. The ending fund balance shows $35.4 million in spendable monies and equal to 14.7 months of actual agency operating expenses in 2023-2024.

- **CSA No. 135** is a dependent special district of the County of San Diego encompassing 3,740 square miles and includes all unincorporated lands as well as 10 of the 18 cities in San Diego County. CSA No. 135 was formed in 1994 to support public safety radio communications through a funding agreement with a third-party (Regional Communication Systems, LLC) and involves operating an 800-megahertz system. Administration of this municipal function is provided by County Sheriff. The current estimated resident population within CSA No. 135 is 1,065,629. LAFCO established a sphere of influence in 1994 coterminous to San Diego County. The sphere was last reviewed and affirmed in 2020. The last completed audit covers 2023-2024 and shows the County of San Diego's net position at $4.88 billion – reflecting an increase of 20.1% increase over the past three audited years. The portion of the County General Fund balance committed to CSA No. 135 totals $1.232 million and equals 58.0 months of actual CSA expenses in 2023-2024.

[2] San Miguel Consolidated FPD's formation was the result of the consolidation of the Grossmont-Mt. Helix and Spring Valley FPDs. San Miguel Consolidated FPD expanded in 1994 through the consolidation and absorption of the East County FPD.

Affected Local Agencies

The affected territory presently lies within the jurisdictional boundaries and spheres of influence of six (6) local agencies directly subject to San Diego LAFCO's planning and regulatory responsibilities as listed below. These agencies qualify as "affected agencies" relative to the proposal before the Commission and received notice as part of the administrative review.[3]

- Grossmont Healthcare District
- Helix Water District
- Metropolitan Water District of Southern California
- San Diego County Flood Control District
- San Diego County Street Lighting District
- San Diego County Water Authority

The affected territory also lies within the following school and college districts and accordingly have received notice of the proposal as part of the administrative review: Grossmont Union High School District, Grossmont – Cuyamaca Community College District and La Mesa – Spring Valley Elementary School District.

DISCUSSION

This item is for San Diego County LAFCO to consider approving – with or without discretionary modifications – the reorganization proposal and its principal action to annex the affected territory to the City of La Mesa with secondary actions to detach the territory from the San Miguel Consolidated FPD and CSA No. 135. The Commission may also apply approval conditions, provided they do not directly regulate land use, property development, or subdivision requirements.

Proposal Purpose

The purpose of the proposed reorganization is to enable the establishment of public wastewater service to the affected territory through annexation to the City of La Mesa. The proposal is prompted by the failure of the existing onsite septic system. Rather than replace the failing system, the applicant seeks to connect to La Mesa's public wastewater infrastructure as a permanent solution. No new development is proposed as part of this request. The timing of the proposal follows the City of La Mesa's conditional approval of the annexation request, General Plan amendment, and pre-zoning assignment in June 2025.

[3] State law defines "affected local agency" as any entity that contains, or would contain, or whose sphere contains or would contain, any territory for which a change of organization is proposed or ordered. Notice of the proposal and hearing were provided to the agencies.

Current and Planned Uses

The affected territory is presently unincorporated. The County of San Diego designates the affected territory as Semi-Rural Residential (SR-0.5) under the Valle de Oro Community Plan and zones it Rural Residential (RR) with a 0.5-acre minimum lot size. The existing single-family residence conforms to these County land use policies. The City of La Mesa General Plan designates the affected territory as Suburban Residential/Scenic Preservation Overlay (R1S-P), which allows higher density – up to 4 dwelling units per acre with a 10,000 square-foot (0.23-acre) minimum lot size. However, given the subject parcel is 0.27 acres, the pre-zoning assignment precludes any additional residential density post-annexation. Both the County and La Mesa would permit one accessory dwelling unit on the property.

State law prohibits La Mesa from modifying this zoning assignment for two years following annexation, with limited exceptions and only after providing notice to LAFCO.

Commission Focus

Three policy determinations guide LAFCO's consideration of this reorganization: (a) conforming sphere of influence amendments, (b) the timing of the reorganization, and (c) whether modifications or approval terms are appropriate. The Commission must also consider other relevant statutes in and outside LAFCO law, as detailed in the following section.

ANALYSIS

San Diego LAFCO's analysis of the proposed reorganization is divided into two subsections. The first addresses the three policy determinations discussed above, considering both statutory and local policy requirements. The second addresses other relevant issues, including compliance with the California Environmental Quality Act (CEQA). Staff's analysis follows.

LAFCO Statute and Local Policy

Item No. 1 | Conforming Sphere of Influence Amendments

The proposed reorganization requires San Diego LAFCO to approve conforming sphere of influence amendments for two of the three subject agencies to achieve statutory and local policy consistency.[4] These amendments involve adding the affected territory to the City of La Mesa's sphere and removing it from the San Miguel Consolidated FPD sphere. These actions reflect LAFCO's statutory responsibility to designate spheres that delineate appropriate jurisdictional boundaries and service areas for affected agencies now and into the immediate future. The following analysis addresses the relevant state and local policy factors.

[4] A sphere of influence is a planning boundary indicating where a city or district is expected to provide services in the future, while a jurisdictional boundary defines the area where it currently holds legal authority and provides services.

- Sphere Factor No. 1:
  Consideration of a Municipal Service Review

  State law requires LAFCO to prepare municipal service reviews to inform sphere updates, generally every five years. Policy L-106 requires municipal service reviews within five years of sphere amendments unless waived. The most recent municipal service review for the City of La Mesa was completed in 2008.[5] Given the limited scope of the proposed sphere amendments, a new municipal service review does not appear warranted. The amendments would simply conform the spheres to match the proposed annexation boundaries — a straightforward administrative alignment rather than a substantive change to either agency's service area.

- Sphere Factor No. 2:
  Consideration of the Agency-Affected Territory Relationship

  Statute requires LAFCOs to consider five factors when acting on spheres of influence. These factors address agency-territory relationships, service needs and adequacy, land use compatibility, and effects on disadvantaged unincorporated communities. Staff's analysis of each factor follows.

  - With respect to **present and planned land uses**, the affected territory comprises one 0.27-acre unincorporated parcel within the Valle de Oro community, currently developed with an unoccupied single-family residence. No future redevelopment is planned. The sphere amendment and associated annexation to La Mesa would remedy a failing onsite septic system by enabling connection to public wastewater service. Removing the parcel from San Miguel FPD's sphere facilitates the required detachment and ensures La Mesa serves as the primary provider of municipal services, including fire protection. The current and planned uses are compatible with the proposed sphere amendments.

  - With respect to **present and probable need for one or more public services**, the affected territory has an immediate need for public wastewater service due to a failing onsite septic system. The proposed sphere amendments directly address this service need.

  - With respect to the **overall adequacy of the agencies' public services**, no material deficiencies have been identified by LAFCO staff as part of the proposal review. As detailed in the following section, La Mesa has existing infrastructure and capacity to extend municipal services — including wastewater and integrated fire protection, rescue, and emergency medical services — to the affected territory without adversely impacting current customers. The conforming sphere amendments formally designate La Mesa as the appropriate service provider and reflect these existing service capacities.

[5] Further, as part of reaffirming La Mesa's sphere of influence, the Commission extended the existing exemption that waives the restriction on approving sphere amendments following a sphere review in cases involving a septic failure.

- With respect to **social or economic communities of interest if relevant to the agencies,** the affected territory is immediately adjacent to La Mesa's existing sphere of influence and jurisdictional boundary. Amending the sphere to include the parcel recognizes its preexisting social and economic connection to the City based on proximity and existing associations. The concurrent amendment removing the territory from San Miguel FPD's sphere reflects La Mesa – not San Miguel FPD – is the most appropriate fire provider for City parcels going forward.

- With respect to the **present and probable need for services involving any disadvantaged unincorporated communities (DUCs)**, none of the affected territory qualifies under the LAFCO statue.

- Sphere Factor No. 3:
  Consideration of Policy L-102

  San Diego LAFCO's L-102 guides sphere actions. The policy directs the Commission to use spheres to guide deliberations on future reorganizations, preserve community identities, discourage duplication of municipal services, and encourage local agency consolidations—whether functional or political. The proposed sphere amendments conform with L-102.

CONCLUSION | MERITS OF CONFORMING SPHERE OF INFLUENCE AMENDMENTS

The conforming sphere amendments for La Mesa and San Miguel Consolidated FPD are justified under both statute and local policy, based on the preceding analysis and two key assumptions:

- **Municipal Service Review Waiver.** The Commission determines new municipal service reviews are not necessary to inform these conforming sphere amendments given the limited scope of service impacts. A waiver is appropriate based on the analysis provided above.

- **Service Provider Designation.** The Commission determines La Mesa – rather than the County of San Diego and San Miguel FPD – is the appropriate service provider for the affected territory, with timing considerations addressed through the reorganization approval itself.

Item No. 2 |
Reorganization Request

San Diego LAFCO's consideration of the proposed reorganization and its timing draws on analyzing baseline factors required in statute as well as applicable policies set by the Commission.[6] Applicable local policies prompted for consideration are headlined by L-107 and its attention to disclosing and/or addressing any known or perceived jurisdictional disputes.

An analysis of these two related timing factors follows.

- Timing Factor No. 1:
  Baseline Considerations: Regional Policies + Service Relationships

  State law requires LAFCOs to consider multiple factors when evaluating jurisdictional changes. These factors include mandatory disclosures – such as current land uses, assessed values, and registered voter counts – as well as discretionary analyses of community needs, service capacities, and agency financial resources. Key conclusions regarding the receiving agency (City of La Mesa) follow, organized by (a) service needs, (b) service availability and capacity, and (c) financial considerations.

  - With respect to **service needs**, the affected territory's current and planned residential uses within a developing urban area merit a full range of public supporting municipal services. Most pressing among these needs is public wastewater service given a failing onsite septic system and potential impacts to the surrounding area.

  - With respect to **service availability and capacities**, La Mesa would directly assume most municipal service responsibilities for the affected territory upon reorganization and highlighted by providing the following core functions: community development; wastewater; integrated fire protection, rescue, and emergency medical; and police protection.[7] La Mesa has adequate capacity to provide these services. Additional details follow.

    La Mesa would assume community planning responsibilities for the affected territory from the County of San Diego as part of the reorganization. The transition is contemplated by City Ordinance (No. 2025-2918) and further prescribed by the City pre-zoning the subject lot Suburban Residential/Scenic Preservation Overlay (R1S-P).

    La Mesa would assume wastewater service responsibility for the affected territory as part of the reorganization. Access to the wastewater infrastructure is readily available via a 10-foot private lateral connection through an easement with the adjacent property along the southwestern property line. The single-

[6] Most of the baseline factors in statute focus on disclosing and otherwise addressing compatibility issues with external goals and policies of other state, regional, and local agencies as well as assessing the ability of subject agencies to provide services going forward. (Reference to Government Code Section 56668).

[7] Potable water service would continue to be provided to the affected territory by Helix WD.

family residence would generate an estimated maximum average daily wastewater flow of 240 gallons, representing 0.015% of La Mesa's remaining available treatment capacity. At full buildout – including one accessory dwelling unit –the parcel would generate 480 gallons per day, or 0.029% of remaining capacity. La Mesa can readily accommodate both scenarios. [8]

La Mesa – through the joint-powers authority Heartland Fire & Rescue – would formally assume integrated fire protection and emergency medical service responsibilities for the affected territory from San Miguel FPD as part of the reorganization. First response would be provided from Station No. 13, located at 9110 Grossmont Boulevard. Estimated response times are 6 minutes for priority calls and 10 minutes for non-priority calls, both within Heartland Fire & Rescue's 7-minute response time standard for urban areas. This transition would have minimal impact on service levels, as La Mesa already serves the territory directly surrounding the parcel.

La Mesa would formally assume police protection responsibilities from the County of San Diego as part of the reorganization. This change would have no material impact on service levels given La Mesa is already serving the territory directly surrounding the subject parcel.

- With respect to **related financial considerations**, staff analysis shows La Mesa has reasonable – albeit strained – financial resources and administrative capacity to assume municipal service responsibilities for the affected territory without significant adverse impacts, given the relatively small scale of this annexation. The City's most recent audited financial statements show a high debt ratio of 193.6%, offset by strong liquidity via a current ratio of 6:1 and positive operating performance, with an average total margin of 7.6% over the last three audited fiscal years (FY2021-FY2023).

- Timing Factor No. 2:
  Consideration of Policy L-107

  LAFCO Policy L-107 requires applicants to disclose any jurisdictional disputes associated with their proposals. No disputes have been disclosed by the applicant and/or the any of the three subject agencies. LAFCO staff has similarly identified no disputes or related concerns through the administrative review.

[8] One single-family residence and one accessory dwelling unit generate an approximate 480 gallons per day (gpd) and divided by 240 gpd per unit. The City of La Mesa's capacity is 5.03 million gallons per day (MGD), and its average daily flow is 4.7 MGD.

CONCLUSION |
MERITS OF REORGANIZATION

Timing of the reorganization and principal action to annex the affected territory to the City of La Mesa is warranted. Justification to approve the proposal is marked by the preceding analysis and highlighted by addressing an immediate municipal need, La Mesa's adequate service capacity, and the absence of jurisdictional disputes. The annexation represents a logical extension of municipal services to an immediately adjacent parcel with no development intensification. Additional analysis of the statutory factors is provided in Appendix A.

Item No. 3 |
Modifications and Terms

San Diego LAFCO staff has identified no modifications to the submitted reorganization warranting Commission consideration. The reorganization would not create corridors or illogical jurisdictional boundaries. Standard approval terms are sufficient and include requiring the applicant to pay any outstanding fees necessary to complete the approval as provided under the LAFCO fee schedule.

CONCLUSION |
MERITS OF ANY MODIFICATIONS OR TERMS

No modifications to the submitted reorganization proposal appear warranted. Standard approval terms are recommended and include receipt of all remaining payments associated with processing of the proposal by the Commission through recordation.

Other Statutory Considerations

Exchange of Property Tax Revenues

California Revenue and Taxation Code Section 99(b)(6) requires affected local agencies to adopt a property tax exchange agreement before LAFCO can approve any jurisdictional change involving annexation or detachment, unless an applicable master agreement exists. The City of La Mesa and County of San Diego have confirmed that an existing master agreement will govern the tax exchange for this reorganization. Under this agreement, La Mesa receives 38% of the County's existing apportionment of the 1% property tax collected within the affected territory. La Mesa shall also receive all of the current apportionment going to San Miguel Consolidated FPD. The estimated annual value of the exchange is currently $7,594.92 based on current assessed values (land and structures).[9]

[9] There are no property taxes to be exchanged with respect to the detachment from CSA No. 135.

Environmental Review

San Diego LAFCO is obligated under CEQA to assess whether environmental impacts would result from activities approved under the Commission's authority, either as a lead or responsible agency. Accordingly, the Commission is tasked with making one or more findings under CEQA in consideration of the proposed reorganization. Staff analysis follows.

- The City of La Mesa serves as lead agency for assessing potential environmental impacts under CEQA and specifically the annexation of the affected territory and extension of public services. La Mesa has determined the reorganization proposal qualifies as a project under CEQA but is categorically exempt from further review under State CEQA Guidelines Section 15319(a) and its provisions covering annexations to cities and special districts of area containing existing public or private structures developed to the density allowed. Staff believe this exemption appropriately applies given the affected territory contains an existing private structure (one single-family residence) developed to the density allowed by the gaining land use authority (La Mesa).

- San Diego LAFCO serves as lead agency under CEQA for the conforming sphere of influence amendments. Staff recommends the Commission find that amending La Mesa's sphere to include the affected territory and San Miguel FPD's sphere to exclude it constitutes a project under CEQA but is exempt from further review under State CEQA Guidelines Section 15061(b)(3). This exemption applies because spheres of influence are State planning policies that do not directly change the environment or authorize new uses or services.

Protest Proceedings

Protest proceedings for the proposed reorganization may be waived by LAFCO should the Commission proceed with approval under Government Code Section 56662. The waiver appropriately applies given that the affected territory is uninhabited as defined under LAFCO law (i.e., fewer than 11 registered voters), the subject agencies have not filed an objection to the waiver, and the landowner has provided written consent.[10]

RECOMMENDATION

Staff recommends San Diego LAFCO conditionally approve the reorganization proposal as submitted, along with the conforming sphere of influence amendments as detailed. This recommendation is consistent with Alternative One in the following section.

[10] LAFCO law defines uninhabited as territory in which less than 11 registered voters reside.

ALTERNATIVES FOR ACTION

The following alternative actions are available to San Diego LAFCO:

Alternative One (recommended):
Adopt the attached resolution conditionally approving the reorganization proposal along with conforming sphere of influence amendments to the City of La Mesa and San Miguel Consolidated FPD. The following sub actions are also provided within the draft resolution:

a) Waiver of L-106
b) Waiver of protest proceedings
c) CEQA findings.

Alternative Two:
Continue consideration to the next regular meeting.

Alternative Three:
Disapprove of the reorganization proposal with direction to staff to return at the next regular meeting with a conforming resolution for adoption.

PROCEDURES FOR CONSIDERATION

This item has been placed on San Diego LAFCO's agenda as part of a noticed public hearing. The following procedures are recommended in the consideration of this item:

1. Disclose any material ex parte communications.
2. Receive verbal presentation from staff unless waived.
3. Open the public hearing and invite comments from the applicant and general public.
4. Discuss item and consider the staff recommendation.

On behalf of the Executive Officer,

Michaela Peters

Michaela Peters
Local Governmental Analyst II

Appendix:

A) Analysis of Proposal Review Factors

Attachments:

1) Vicinity Map of the Affected Territory
2) Draft Resolution of Approval
3) Application Materials

APPENDIX A

Government Code Section 56668
Mandatory Proposal Review Factors

a) Population and population density; land area and land use; per capita assessed valuation; topography, natural boundaries, and drainage basins; proximity to other populated areas; the likelihood of significant growth in the area, and in adjacent areas, in the next 10 years.

The affected territory as submitted comprises a 0.27-acre parcel currently within the County of San Diego, adjacent to the City of La Mesa and within the unincorporated Valle de Oro community. The subject parcel is presently developed with an unoccupied 2,346 square-foot single-family residence built in 1951 located at 9365 Carmichael Drive. The County of San Diego Assessor's Office identifies the subject parcel as 495-335-05 with a total assessed land value of $603,432 with the last transaction recorded April 2021.

b) The need for municipal services; the present cost and adequacy of municipal services and controls in the area; probable future needs for those services and controls; probable effect of the proposed incorporation, formation, annexation, or exclusion and of alternative courses of action on the cost and adequacy of services and controls in the area and adjacent areas.

The County of San Diego serves as the primary purveyor of general governmental services to the affected territory. These governmental services include community planning, roads, and law enforcement. Other pertinent service providers include CSA No. 135 (regional communications), Helix WD (domestic water), and San Miguel Consolidated FPD (fire protection and emergency medical). The timing of the proposal is specific to the need for public wastewater and is the focus of the succeeding analysis.

- **Extending Public Wastewater to Affected Territory**
  Connection to City of La Mesa's wastewater main is available through a 10' x 10' lateral easement with the adjacent property at the southwesterly portion of the property line. This easement agreement was entered into by AJX Homes LLC and the adjacent property owners on August 22nd, 2024. It is projected the maximum average day wastewater flow generated within the affected territory is 240 gallons. This projected amount can be readily accommodated by La Mesa and represents 0.145% of its available treatment capacity remaining within its wastewater system. Ultimate buildout would include an accessory dwelling unit and increase the average day wastewater flow to 480 gallons per day or 0.029% of the remaining available capacity.

c) The effect of the proposed action and of alternative actions, on adjacent areas, on mutual social and economic interests, and on local governmental structure.

Approving the reorganization would create social and economic ties between the affected territory and the City of La Mesa.

d) The conformity of the proposal and its anticipated effects with both the adopted commission policies on providing planned, orderly, efficient patterns of urban development, and the policies/priorities set forth in G.C. Section 56377.

Approving the proposed reorganization and annexation to La Mesa would facilitate the orderly expansion of the City's jurisdictional boundary. Approval would be consistent with the Commission's adopted policies to sync urbanized uses with urbanized services. The affected territory does not contain "open-space" as defined under LAFCO law and no conflicts exists under Government Code Section 56377. Additional analysis concerning conformance with germane Commission policies follows.

- San Diego LAFCO Policy L-107 requires applicants to disclose and address potential jurisdictional issues associated with their proposals and if applicable requires a consultation process with affected agencies, interested parties, or organizations to help discuss and potentially remedy concerns unless waived by the Executive Officer. No jurisdictional disputes or related concerns were identified or disclosed by the applicant or by affected agencies or interested parties in the review of the proposal.

e) The effect of the proposal on maintaining the physical and economic integrity of agricultural lands, as defined by G.C. Section 56016.

The affected territory does not contain "prime agricultural land", or "agricultural land" as defined under LAFCO law. Specifically, the affected territory does not contain lands currently used for any of the following purposes: producing an agricultural commodity for commercial purposes; left fallow under a crop rotational program; or enrolled in an agricultural subsidy program. Approval of the reorganization proposal would not adversely affect the physical or economic well-being of agricultural lands.

f) The definiteness and certainty of the boundaries of the territory, the nonconformance of proposed boundaries with lines of assessment, the creation of islands or corridors of unincorporated territory, and other similar matters.

LAFCO is in receipt of a draft map and geographic description of the affected territory that details metes and bounds that appear consistent with the standards of the State Board of Equalization and conforming with lines of assessment. LAFCO approval would be conditioned on approval of the map and geographic description by the County Assessor's Office and address any modifications enacted by the Commission. No irregular or otherwise illogical boundary features would be generated from proposal approval.

g) A regional transportation plan adopted pursuant to Section 65080.

The proposed reorganization would facilitate the extension of public wastewater services to the affected territory and in doing so accommodate its current residential uses. The anticipated outcomes do not generate any known conflicts with *San Diego Forward*, the regional transportation plan adopted by the San Diego Association of Governments.

h) Consistency with the city or county general and specific plans.

The affected territory is designated by the County of San Diego as Semi-Rural Residential (SR-0.5) with specific development policies delegated within the Valle de Oro Community Plan. The County also zones the affected territory as Rural Residential (RR) with a 0.5-acre minimum lot size. The City of La Mesa General Plan separately designates the affected territory as Suburban Residential/Scenic Preservation Overlay (R1S-P) which prescribes a 10,000 square-foot – or 0.23-acre –minimum lot size and up to 4 dwelling units per acre. This pre-zoning assignment prohibits any additional density development within the affected territory post annexation given the subject lot is 0.27 acres in size. Additional intensity would however be permitted by both the County and La Mesa via one accessory dwelling unit.

i) The sphere of influence of any local agency affected by the proposal.

See the agenda report.

j) The comments of any affected local agency or other public agency.

Notice of the reorganization proposal was distributed to all affected and subject agencies as required under LAFCO law. Notices were also provided to all local college and school districts. No written comments were submitted ahead of preparing this agenda report for distribution on October 27, 2025.

k) The ability of the newly formed or receiving entity to provide the services that are the subject of the application to the area, including the sufficiency of revenues for those services following the proposed boundary change.

Information collected and reviewed as part of this proposal indicates La Mesa has reasonably sufficient – albeit strained -- financial resources and administrative capacity to assume municipal service responsibilities for the affected territory without significant, adverse impacts, given the relatively small scale of this annexation. This statement is supported by the following factors.

- La Mesa's last audit covers FY 2022-2023 and shows the City finished with strong liquidity levels with an agency-wide current ratio of 5.7 (i.e. $5.72 in current assets for every $1.00 in current liabilities).

- La Mesa finished FY 2022-2023 with low capital levels and highlighted by total liabilities exceeding total assets, resulting in a debt ratio of 193.6% (i.e. $193.61 out of every $100.00 in net assets are financed).[11]

- La Mesa finished FY 2022-2023 with an overall total margin of 11.9%.

[11] La Mesa appears to be financially constrained, as indicated by its high debt ratio in the most recent (though somewhat dated) audit. However, the proposed annexation is expected to have minimal fiscal impacts for La Mesa, primarily through the addition of a new sewer system customer and the associated increase in property tax revenue. LAFCO is scheduled to conduct a thorough and necessary review of La Mesa's financial condition as part of the upcoming Municipal Service Review (MSR).

l) Timely availability of adequate water supplies for projected needs as specified in G.C. Section 65352.5.

The affected territory's existing residential uses are within the Helix WD's retail potable water system with wholesale supplies provided by the San Diego County Water Authority and the Metropolitan Water District of Southern California. No changes to these service arrangements are proposed. Approval of the proposed reorganization would not affect these existing relationships and/or commitments.

m) The extent to which the proposal will affect a city or cities and the county in achieving their respective fair shares of the regional housing needs as determined by the appropriate council of governments.

The proposed reorganization would not impact any local agencies in accommodating their regional housing needs.

n) Any information or comments from the landowners, voters, or residents.

The affected territory is considered uninhabited as defined by LAFCO law (containing 11 registered voters or less). The landowner supports the proposed reorganization and has provided written consent to the proceedings as the petitioners.

o) Any information relating to existing land use designations.

See above analysis for (h).

p) The extent to which the proposal will promote environmental justice.

The proposed reorganization is not expected to have a negative impact on environmental justice. A review of existing pollution burdens and susceptible populations within the affected territory follows, based on data available from the California Environmental Protection Agency through its online assessment tool (CalEnviroScreen 4.0).

- The affected territory's **composite pollution burden ranking** falls in the 31st percentile with an internal range between 0 and 77 percentiles. Four pollution burden measurements exceed the 50th percentile and are considered noteworthy. These measurements are related to Ozone, Diesel PM, Traffic, and Hazardous Waste.

- The affected territory's **composite susceptible population ranking** falls in the 32nd percentile with an internal range between the 5th and 97th percentiles. Two of these at-risk groups exceed the 50th percentile: Low Birth Rate and Housing Burden. Of these, low birth rate ranks above the 90th percentile, indicating a very high impact. This further reinforces the benefit of the proposal in providing wastewater service to the affected territory, thereby avoiding potentially harmful environmental impacts to local waterways caused by on-site septic systems.

A summary of all tracked pollution burdens and susceptible populations follows.

Census Tract No. 6073015200 Pollution Burdens and Susceptible Population (Source: California Environmental Protection Agency and SD LAFCO)	
	Affected Territory + Surrounding Lands
Census Tract No.	6073015200
Estimated Population	3,773
Pollution Burden	Weighted Percentile
… Percentile	31.9
Indicator | Air Quality: Ozone	**51.0**
Indicator | Air Quality: PM 2.5:	47.5
Indicator | Air Quality: Diesel PM:	**50.9**
Indicator |Pesticides:	0.0
Indicator | Toxic Releases:	30.2
Indicator |Traffic:	**77.9**
Indicator | Drinking Water Contaminants:	45.9
Indicator | Lead in Housing:	42.6
Effects | Cleanup Sites:	43.0
Effects | Groundwater Threats:	0.0
Effects | Hazardous Waste:	**52.6**
Effects | Impaired Water:	12.5
Effects | Solid Waste:	0.0
Sensitive Population	Weighted Percenti
… Percentile	32.6
Population | Asthma:	37.5
Population | Low Birth Weight:	**97.9**
Population | Cardiovascular Disease:	23.2
Population | Education:	16.2
Population | Linguistic Isolation:	5.6
Population | Poverty:	9.0
Population | Unemployment:	36.4
Population | Housing Burden:	**50.7**

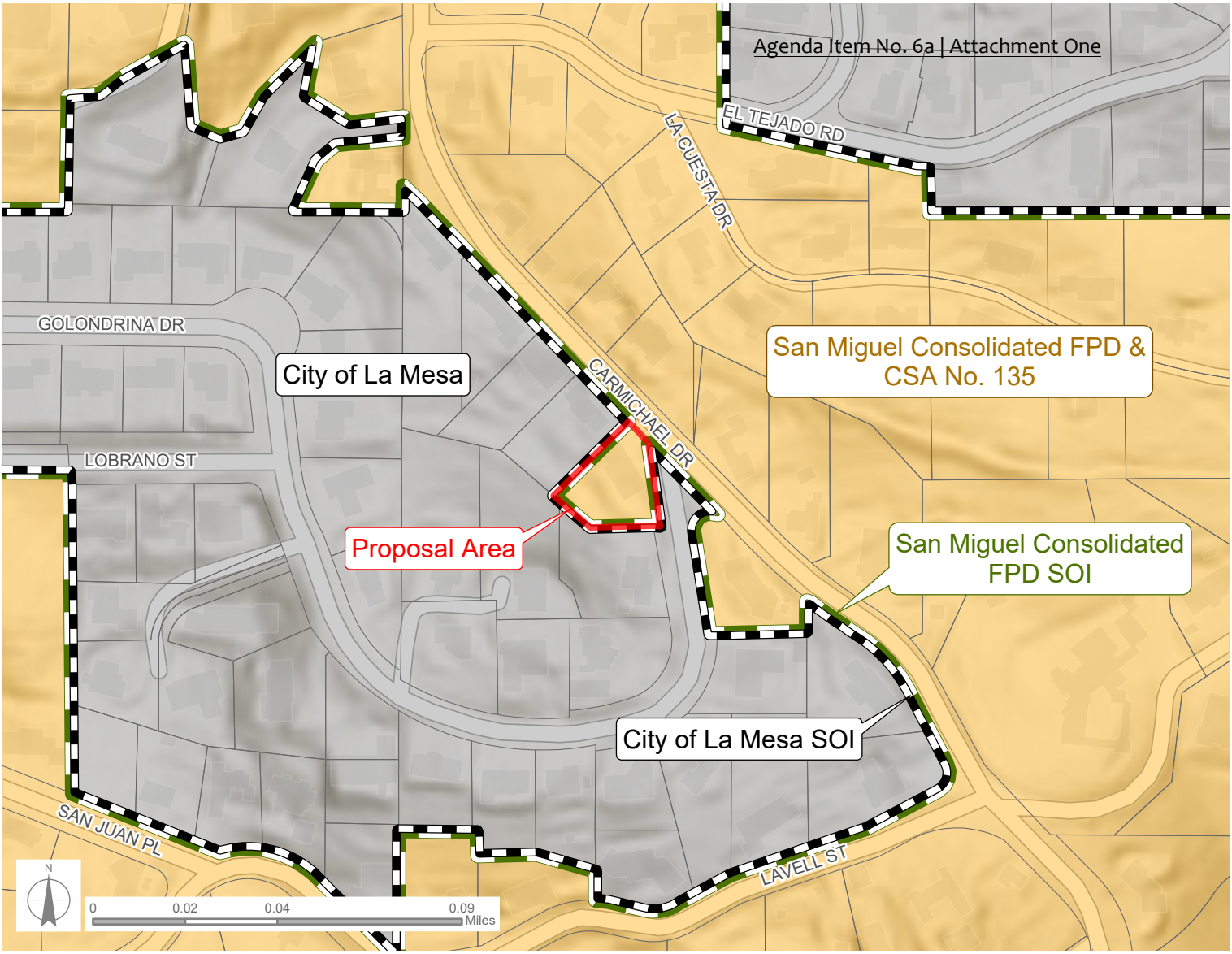
q) Information contained in a local hazard mitigation plan, information contained in a safety element of a general plan, and any maps that identify land as a very high fire hazard zone or maps that identify land determined to be in a state responsibility area, if it is determined that such information is relevant to the affected territory.

The County of San Diego General Plan includes a hazard mitigation component addressing risks from fire, flooding, and earthquakes. The affected territory is designated within an "low" fire hazard severity zone, a "low" earthquake hazard zone, and located outside both the tsunami hazard zones and 100-year floodplain.

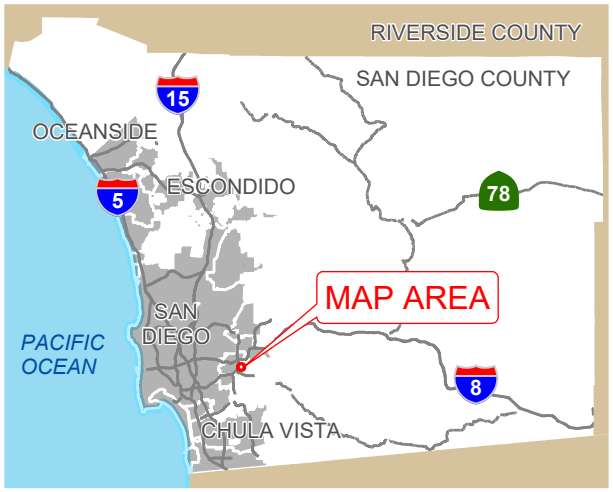
r) Section 56668.3(a)(1) Whether the proposed annexation will be for the interest of the landowners or present or future inhabitants within the district and within the territory proposed to be annex to the district.

Approval of the reorganization would be in the best interest of the current and future landowners and/or visitors of the affected territory by providing access to reliable public wastewater service going forward.

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RO22-04 "AJX HOMES LLC - CARMICHAEL DRIVE REORGANIZATION" | ANNEXATION TO THE CITY OF LA MESA WITH CONCURRENT DETACHMENTS FROM SAN MIGUEL CONSOLIDATED FPD AND CSA NO. 135 AND RELATED ACTIONS

SOI = Sphere of Influence

- Proposal Area
- City of La Mesa SOI
- San Miguel Consolidated FPD SOI
- San Miguel FPD & CSA No. 135
- City of La Mesa

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

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RESOLUTION NO. _____

SAN DIEGO COUNTY LOCAL AGENCY FORMATION COMMISSION

MAKING DETERMINATIONS, APPROVING, AND ORDERING A CHANGE OF ORGANIZATION

"AJX HOMES LLC – CARMICHAEL DRIVE REORGANIZATION"
ANNEXATION TO THE CITY OF LA MESA WITH CONCURRENT DETACHMENTS FROM SAN MIGUEL CONSOLIDATED FIRE PROTECTION DISTRICT AND COUNTY SERVICE AREA 135 AND RELATED ACTIONS
(LAFCO FILE NO: RO22-04)

WHEREAS, on May 30, 2023, interested landowner – AJX Homes LLC – filed a petition to initiate proceedings and an application with the San Diego County Local Agency Formation Commission, hereinafter referred to as "Commission", pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000; and

WHEREAS, the application seeks approval of a reorganization to annex 0.27 acres of unincorporated territory within the Valle de Oro community to the City of La Mesa and also involves concurrent detachments from San Miguel Consolidated FPD and CSA No. 135;

WHEREAS, the affected territory as submitted comprises a single unincorporated parcel developed with an unoccupied single-family residence and identified by the County of San Diego Assessor's Office as 495-335-05 with an assigned situs of 9365 Carmichael Drive; and

WHEREAS, an Easement Agreement was entered into on August 22nd, 2024 between AJX Homes LLC (grantee) and adjacent property owners Floyd Murray and Tiffany Hamilton (grantor) to allow access for the grantee to receive a 10' X 10' private lateral for public wastewater service via the City of La Mesa; and

WHEREAS, on November 20, 1984, the County of San Diego and City of La Mesa approved a Master Property Tax Transfer Agreement that will govern the property tax exchange associated with the reorganization of the affected territory; and

WHEREAS, the Commission's Executive Officer has reviewed the proposed reorganization and prepared a report with recommendations; and

WHEREAS, the Executive Officer's report and recommendations on the proposal have been presented to the Commission in the manner provided by law; and

WHEREAS, the Commission heard and fully considered all the evidence presented at a noticed public meeting on the proposal on November 3, 2025;

WHEREAS, the Commission considered all the factors required by law under Government Code Section 56425 and 56668 as well as adopted local policies and procedures.

NOW, THEREFORE, THE COMMISSION DOES HEREBY RESOLVE, DETERMINE, AND ORDER as follows:

1. The public meeting was held on the date set therefore, and due notice of said meeting was given in the manner required by law.

2. At the public meeting, the Commission considered the Executive Officer's report.

3. With respect to considering the effects of the proposed reorganization under the California Environmental Quality Act (CEQA), the Commission makes the following findings:

    - The City of La Mesa serves as lead agency for assessing potential environmental impacts under CEQA and specifically the annexation of the affected territory and extension of public services. La Mesa has determined the reorganization proposal qualifies as a project under CEQA but is categorically exempt from further review under State CEQA Guidelines Section 15319(a) and its provisions covering annexations to cities and special districts of area containing existing public or private structures developed to the density allowed. The Commission concurs with the City's findings, given the affected territory contains existing private structures developed to the density allowed by the gaining land use authority (La Mesa).

    - The Commission serves as lead agency under CEQA for the conforming sphere of influence amendments to the City of La Mesa and the San Miguel Consolidated FPD. The Commission finds this action constitutes a project under CEQA but is exempt from further review under State CEQA Guidelines Section 15061(b)(3). This exemption appropriately applies given it can be seen with certainty spheres are planning policies and any associated actions (establishment, update, or amendment) in and of itself do not make any changes to the environment or authorize any new uses.

4. The Commission CONDITIONALLY APPROVES the conforming sphere of influence amendments to include the affected territory in City of La Mesa's sphere and remove the affected territory from San Miguel Consolidated FPD's sphere and in doing so accommodate the reorganization as shown in the vicinity map provided as Exhibit A.

    a. Approval of the above-stated sphere of influence amendments includes an enabling waiver by the Commission as recommended by the Executive Officer of the provision in L-106 that would otherwise require the preparation of one or more municipal service reviews.

    b. Approval of the above-stated sphere of influence amendments are contingent upon the approval and related issuance of a Certificate of Completion.

    c. Approval includes the Commission making findings under Government Code Section 56425 consistent with the statements provided in the accompanying Executive Officer's written report.

5. The Commission CONDITIONALLY APPROVES the reorganization without modifications and subject to conditions as provided subject to recordation of a certificate of completion for the proposal. Approval involves all the following:

    a) Annexation of the affected territory to the City of La Mesa as shown in "Exhibit B-1" and described in Exhibit "B-2."

    b) Detachment of the affected territory from the San Miguel Consolidated FPD as shown in "Exhibit B-1" and described in "Exhibit B-2"

6. The Commission CONDITIONS all approvals on the following terms being satisfied by November 3, 2026 unless an extension is requested in writing and approved by the Executive Officer:

    a) Completion of the 30-day reconsideration period provided under Government Code Section 56895.

    b) Submittal to the Commission of final map and geographic description of the affected territory as approved by the Commission conforming to the requirements of the State Board of Equalization – Tax Services Divisions.

    c) Submittal to the Commission of the following payments:

        - A check made payable to LAFCO in the amount of $100.00 for the County of San Diego-Clerk Recorder to reimburse for filing two CEQA Notice of Exemptions consistent with the findings in the resolution.

        - A check made payable to the State Board of Equalization for processing fees in the amount of $300.00.

        - A check made payable to LAFCO to reimburse for the actual costs of noticing the proposal for the public hearing in the San Diego Union Tribune.

    d) Written confirmation from San Miguel Consolidated FPD that all terms required of their Board involving the reorganization are satisfied.

7. The affected territory shall not be re-zoned by the City of La Mesa for a period of no less than two years following the recordation of a Certificate of Completion unless exempting procedures are satisfied under Government Code § 56375(e).

8. The Commission assigns the proposal the following short-term designation:

    "AJX Homes LLC – Carmichael Drive Reorganization".

9. The affected territory as designated by the Commission is uninhabited as defined in Government Code Section 56046.

10. The Commission waives conducting authority proceedings under Government Code Section 56662.

11. The San Miguel Consolidated FPD and CSA NO. 135 are registered-voter districts.

12. The City of La Mesa, San Miguel Consolidated FPD, and CSA NO. 135 utilize the County of San Diego assessment roll.

13. The affected territory will be liable for any existing bonds, contracts, and/or obligations of the City of La Mesa as provided under Government Section 57328, and will be subject to any previously authorized taxes, benefit assessments, fees or charges of La Mesa as provided under Government Code Section 57330.

14. The effective date of approval shall be the date of recordation but not before the completion of a 30-day reconsideration period and only after all terms have been completed as attested by the Executive Officer.

15. As allowed under Government Code Section 56107, the Commission authorizes the Executive Officer to make non-substantive corrections to the resolution to address any technical defects, errors, irregulates, or omissions.

16. The Executive Officer is hereby authorized and directed to transmit copies of this resolution as provided in Sections 56880-56882 of the Government Code.

17. The Executive Officer is further authorized and directed to prepare, execute, and record a Certificate of Completion, make the required filings with the County Assessor, County Auditor, and the State Board of Equalization as required by Section 57200, et seq., of the Government Code.

**

PASSED AND ADOPTED by the Commission on November 3, 2025 by the following vote:

AYES:

NOES:

ABSENT:

ABSTAINING:

**

ATTEST:

_____
Keene Simonds
Executive Officer

EXHIBIT A
MAP OF SPHERE OF INFLUENCE AMENDMENTS FOR
CITY OF LA MESA AND SAN MIGUEL CONSOLIDATED FIRE PROTECTION DISTRICT

-Placeholder-

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EXHIBIT B-1
MAP OF AFFECTED TERRITORY

-Placeholder-

Blank for Photocopying

EXHIBIT B-2
GEOGRAPHIC DESCRIPTION OF THE AFFECTED TERRITORY

-Placeholder-

Blank for Photocopying

PROPERTY-OWNER CONSENT FORM FOR INCLUSION OF PROPERTY

Note: Processing of jurisdictional boundary change proposals, which involve *uninhabited*[1] territory, can be expedited by approximately 60 days if all affected landowners consent to the proposal. If you wish to take advantage of this option, please return the completed PROPERTY-OWNER CONSENT FORM FOR INCLUSION OF PROPERTY to San Diego LAFCO with your application for a jurisdictional boundary change. If consenting signatures of *100%* of the affected property owners are affixed and LAFCO does not receive any opposition from subject agencies, the Commission may consider the proposal without public notice, public hearing and/or an election.

[1] Territory included within a proposed boundary change that includes less-than12 registered voters is considered ***uninhabited*** (Government Code 56045).

The undersigned owners(s) of property hereby consent(s) to inclusion of that property within a proposed change of organization or reorganization consisting of:

(Please list all proposed actions)

Annexation to:
1. City of La Mesa
2. City of La Mesa (Heartland Fire and Rescue)
3. _____

Detachment from:
1. County of San Diego
2. San Miguel Consolidated Fire Protection District
3. _____

	Date	Signature	Assessor's Parcel Number(s)
1.	5-26-2023	Lilian Trujillo	495-335-05
2.		Lilian Trujillo, Managing Member - AJX Homes 1, LLC, a California Limited Liability Company	
3.			
4.			
5.			

Attach additional sheets if necessary

Part IVb: LANDOWNER PETITION

Petitions must meet minimum signature requirements (see Part V). Signatures must be secured within six months of the date on which the first signature was affixed. Petitions must be submitted to the LAFCO Executive Officer within 60 days after the last signature is affixed (Govt. Code § 56705).

Each of the undersigned states:

- I personally signed this petition.
- I am a landowner of the affected territory.
- I personally affixed hereto the date of my signing this petition and the Assessor's Parcel Number(s), or a description sufficient to identify the location of my land.

Lilian Trujillo, Managing Member
AJX Homes 1, LLC, A California Limited
Liability Company

Name of Signer	Assessor's Parcel Number(s)	Date Signed	Official Use
Sign Lilian Trujillo, managing member Lilian Trujillo, Managing Member AJX Homes 1, LLC, A California Limited Liability Company	495-335-05	8.13.2023	
Sign _____ Print _____			
Sign _____ Print _____			
Sign _____ Print _____			
Sign _____ Print _____			
Sign _____ Print _____			

ITEM NO. 4
(SEE PG 2 OF 3)

CITY OF
LA MESA
JEWEL of the HILLS

STAFF REPORT

REPORT to the MAYOR and MEMBERS of the CITY COUNCIL
From the CITY MANAGER

DATE: February 28, 2023

SUBJECT: APPROVAL OF INITIATION OF AN ANNEXATION AND RELATED GENERAL PLAN AMENDMENT FOR THE PROPERTY LOCATED AT 9365 CARMICHAEL DRIVE, APN 495-335-05-00 (PROJECT 2022-0492)

ISSUING DEPARTMENT: Community Development/Public Works

SUMMARY:

Issues:

Should the City Council initiate the annexation of the property located at 9365 Carmichael Drive, in the County of San Diego, and initiate a related General Plan Amendment?

Recommendation:

Adopt the draft resolution approving the initiation of an annexation and related General Plan Amendment **(Attachment A).**

Fiscal Impact:

There would be no impact to the General Fund related to this project. City of La Mesa policy is to recover 100% of the cost of staff time through application processing fees. The City would collect increased property tax revenue from the existing single-family development.

City's Strategic Goals:

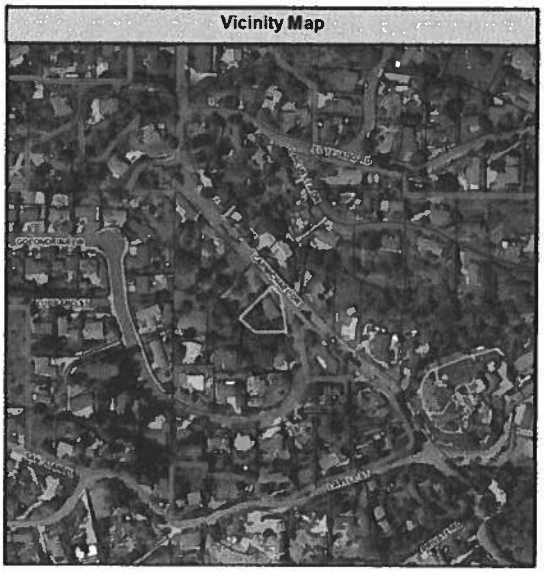
- Revitalize neighborhoods and corridors
- Ensure safe and affordable homes for all current and future residents

Environmental Review:

This project is categorially exempt under the California Environmental Quality Guidelines Section 15319. In addition, the project is exempt in accordance with Title 14 Cal. Code Regs. 15061(b)(3).

BACKGROUND:

The subject property is located in San Diego County, surrounded on two sides by parcels located in the City of La Mesa (**Attachment A**). The lot is currently developed with a single-family residence and single-car garage. Driveway access is taken from Carmichael Drive, which is located in the County of San Diego, similar to several neighboring properties that are within the City limits. The lot also has frontage on Golondrina Drive, which is located in the City of La Mesa.



The applicant has requested to connect to City sewer facilities due to their septic system failing, and a formal jurisdictional change to annex the subject parcel. The annexation process would result in the property being officially incorporated into the City of La Mesa jurisdictional boundary and certain service providers would be reorganized from County to City service. A General Plan amendment is required to assign a land use designation to the subject property. Project review will be coordinated with the Local Agency Formation Commission (LAFCO). The proposal would be shared with the Casa De Oro planning group, which is a citizen advisory board to the County.

DISCUSSION:

This proposal is to initiate the annexation of the property addressed 9365 Carmichael Drive, currently located in the County of San Diego, and initiate a related General Plan amendment. Currently, there is no assigned La Mesa land use designation because the subject property is located outside of the City jurisdictional boundary and is included in the County's General Plan. The County General Plan land use designation is "Semi-Rural Residential (SR-0.5)" (1 – 2 du/acre). As part of the review process, an appropriate land use designation will be recommended by staff to the Planning Commission, with their final recommendations forwarded to City Council at noticed public hearings.

OWNER / AGENT AUTHORIZATION LETTER

November 16, 2022

City of La Mesa
Community Development Department / Planning Division
8130 Allison Avenue
La Mesa, California 91942

Attention: Laura Traffenstedt, Assistant Planner

Re: 9365 Carmichael Drive, La Mesa, CA 91941
APN 495-335-05

Ms. Traffenstedt,

For the record, and effective the date of this letter, APPLIED CONSULTANTS and its Engineering Staff, is hereby authorized to act as my Owner / Applicant Agent with all of the required City of La Mesa and LAFCO related processing for the Annexation Application of the above referenced project.

If you have any questions, comments or require any additional information regarding this matter, please do not hesitate to call.

AJX Homes 1, LLC, A California Limited Liability Company

Lilian Trujillo, managing member 11.30.22

Lilian Trujillo, Managing Member Date

RESOLUTION NO. 2025-074

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF LA MESA APPROVING A GENERAL PLAN AMENDMENT FOR PROJECT 2022-0492 ASSIGNING THE PROPERTY ADDRESSED 9365 CARMICHAEL DRIVE (APN 495-335-05-00) A LAND USE DESIGNATION OF SUBURBAN RESIDENTIAL

WHEREAS, on April 27, 2022, Project Applicant, AJX Homes LLC, submitted an application for an annexation, General Plan Amendment, and Zoning Ordinance Amendment ("Project 2022-0492") for the property addressed 9365 Carmichael Drive (APN 495-335-05-00) ("Property");

WHEREAS, the Property is currently located within the unincorporated area of San Diego County, surrounded on two sides by parcels located in the City of La Mesa;

WHEREAS, the Property owner has requested jurisdictional boundary change through annexation to connect to the City's sewer system due to a failing septic system;

WHEREAS, upon annexation, the Property would detach from the County of San Diego and the San Miguel Consolidated Fire Protection District and would be incorporated into the City of La Mesa jurisdictional boundary;

WHEREAS, the City Sphere of Influence is coterminous with the City boundary;

WHEREAS, upon annexation, the City's Sphere of Influence would expand to include only the subject property, consistent with the jurisdictional boundary change;

WHEREAS, a General Plan Amendment is required to assign a City of La Mesa land use designation to the subject property;

WHEREAS, the Council considered the proposed General Plan Amendment for annexation of the Property and adopted Resolution No. 2023-016 authorizing the processing of a General Plan Amendment application to be initiated;

WHEREAS, surrounding properties within the City's jurisdiction have a General Plan Land Use designation of "Suburban Residential" (4 dwelling units per acre (du/ac));

WHEREAS, the Suburban Residential land use designation is assigned to suburban neighborhoods with lots of 10,000 square feet or larger, which results in lower density developments with space between residences and relatively large yards;

WHEREAS, the 11,968 square-foot Property is consistent with the land use designation of the residential neighborhood that generally surrounds the site;

WHEREAS, the project was reviewed pursuant to the California Environmental Quality Act ("CEQA") and was determined to be exempt from environmental review;

WHEREAS, the Planning Commission did receive and consider a staff report for the proposal;

WHEREAS, on May 21, 2025, the Planning Commission held a noticed public hearing and accepted public testimony in consideration of Project No. 2022-0492;

WHEREAS, on May 21, 2025, the Planning Commission adopted Resolution PC-2025-09 recommending that Council approve the proposed General Plan Amendment assigning a land use designation of Suburban Residential; and

WHEREAS, the Council did hold a public hearing on June 24, 2025, and accepted public testimony in considering Project No. 2022-0492.

NOW, THEREFORE, THE CITY COUNCIL FINDS AND DETERMINES AS FOLLOWS:

1. The project is exempt from environmental review pursuant to CEQA Guidelines Section 15319 and Title 14 Cal. Code Regs. 15061(b)(3). Section 15319 categorically exempts annexations of existing facilities and lots for exempt facilities. Title 14 Cal. Code Regs. 15061(b)(3) states that CEQA does not apply, as a general rule, where there is no potential for causing a significant effect on the environment. The project meets all of the conditions necessary to qualify for the exemptions and none of the exceptions listed in Section 15300.2 apply.

2. That the General Plan Amendment is appropriate for the site, is compatible with surrounding land uses, and is consistent with the goals and policies of the General Plan.

NOW, THEREFORE, BE IT AND IT IS HEREBY RESOLVED by the City Council of the City of La Mesa as follows:

1. The foregoing findings of fact and determinations are true and hereby made a part hereof.

2. The foregoing findings of fact and determinations are supported by the staff report, record in its entirety including minutes, plans, and exhibits, all of which are herein incorporated by reference.

3. The Council approves the General Plan Amendment assigning the land use designation of Suburban Residential, subject to LAFCO approval of the annexation.

PASSED AND ADOPTED at a Regular meeting of the City Council of the City of La Mesa, California, held the 24th day of June 2025, by the following vote, to wit:

AYES: Councilmembers Cazares, Lothian, Suzuki, and Vice Mayor Dillard

NOES: None

ABSENT: Mayor Arapostathis

CERTIFICATE OF CITY CLERK

I, MEGAN WIEGELMAN, City Clerk of the City of La Mesa, California, do hereby certify the foregoing to be true and exact copy of Resolution No. 2025-074, duly passed and adopted by the City Council of said City on the date and by the vote therein recited.

MEGAN WIEGELMAN, CMC, City Clerk

(SEAL OF CITY)

DOC# 2024-0240224

Sep 06, 2024 11:48 AM
OFFICIAL RECORDS
JORDAN Z. MARKS,
SAN DIEGO COUNTY RECORDER
FEES: $268.00 (SB2 Atkins: $225.00)
PCOR: N/A
PAGES: 6

RECORDING REQUESTED BY:

Floyd Murray & Tiffany Hamilton
9332 Golondrina Street
La Mesa, CA 91941

AJX Homes 1, LLC
5959 Mission Gorge Road, Ste. 206
San Diego, CA 92120

WHEN RECORDED MAIL TO:

Floyd Murray & Tiffany Hamilton
9332 Golondrina Street
La Mesa, CA 91941

AJX Homes 1, LLC
5959 Mission Gorge Road, Ste. 206
San Diego, CA 92120

APN NO.S **495-335-05** & **495-335-15**

Space above this line for recorder's use

Documentary Transfer Tax $ 0

EASEMENT AGREEMENT

(Floyd Murray and Tiffany Hamilton, Husband and Wife as Joint Tenants to AJX Homes 1, LLC, A California Limited Liability Company)

THIS AGREEMENT IS ENTERED INTO ON THE 22nd day of August, 2024, by and between **Floyd Murray and Tiffany Hamilton, husband and wife as joint tenants,** hereinafter referred to as "Grantor" for the benefit of **AJX Homes 1, LLC, A California Limited Liability Company** hereinafter referred to as "Grantee". This agreement is made with respect to the following facts:

RECITALS

A. "Grantors" are the owners of that certain real property as described below situated in the City of San Diego, State of California, hereinafter referred to as the "Servient Tenement".

Those Portions of Lots 1 and 6 in Block D of El Tejado, according to Map thereof no. 2144, in the City of La Mesa, County of San Diego, State of California filed in the office of the County Recorder of San Diego County, January 9, 1929.

B. "Grantees" are the owners of that certain real property as described below situated in the City of San Diego, State of California, hereinafter referred to as the "Dominant Tenement".

Lot 5 in Block D of El Tejado, according to Map thereof no. 2144, in the City of La Mesa, County of San Diego, State of California filed in the office of the County Recorder of San Diego County, January 9, 1929.

C. In consideration of a grant of a private sewer easement from Grantor to Grantee of even date herewith, the Grantor has agreed to grant the following described easement in which Grantee is willing to **receive a private sewer lateral of the Grantor's property's** for grant of easement.

NOW, THEREFORE, IT IS AGREED by and between the parties hereto:

1. For the consideration recited above, Grantor grants to Grantee a private sewer easement, appurtenant to the Dominant Tenement and described as follows:

a. A private sewer easement located within the "Servient Tenement" above described property as the of the "Servient Tenement" property; more particularly described as follows:

That portion of Lot 1 in Block D of El Tegado, according to Map thereof no. 2144, filed in the County Recorder of San Diego County on January 9, 1929, described as follows:

Beginning at the most Southwesterly Corner of Lot 5 of the above mentioned Map No. 2144, thence along the southerly property line of said Lot 5, South 48°38'30" East, 6.10' feet to the True Point of Beginning, said point also being the northwesterly property corner of Lot 1 of the above mentioned Map No. 2144, thence South 41°21'30" West, 10.00 feet to a point along the southerly sideline of the existing sewer easement to the City of La Mesa per document no. 75-276834, recorded October 8, 1975; thence along said easement sideline North 48°38'30" West, 10.00 feet; thence North 41°21'30" East, 10.00 feet; thence South 41°21'30" East, 3.90 feet to the True Point of Beginning.

b. The owner of the Dominant Tenement shall have **a 10' x 10' private sewer easement for the purposes of a private sewer lateral** over and across that described portion of property of the "Servient Tenement". See attached Exhibit "A", entitled "Private Sewer Easement Plat"

c. The Owner of the **The Dominant Tenement shall have the responsibility of maintaining and servicing said sewer lateral facilities that are within said described portion of the property owner of the** "Servient Tenement" **as described above.**

2. The private sewer easement granted in this agreement shall be perpetual and shall run with the land to subsequent owners. There shall be no assignment of this agreement other than to successors in interest of the Grantees.

3. Grantees use of the private sewer easement granted in this agreement shall be exclusive. Grantors shall not grant or assign to others any right-of-right or easements in the Servient Tenement for the similar purposes set forth in this agreement. Notwithstanding the terms of this provision, Grantors reserves the right to use the Servient Tenement in any manner consistent with Grantee's free use and enjoyment of the easement.

4. Any legal action or proceeding arising out of or relating to this agreement is brought by either party to this agreement, the prevailing party shall be entitled to receive from the other party, in addition to any other relief that may be granted, the reasonable attorney's fees, costs, and expenses incurred in the action or proceeding by the prevailing party.

5. This agreement constitutes the entire agreement between the Grantors and Grantee relating to the above easement. Any prior agreements, promises negotiations, or representatives not expressly set forth in this Agreement are of no force and effect. Any amendment to this agreement shall be of no force and effect unless it is in writing and signed by Grantors and Grantee.

6. This agreement shall be binding on and shall inure to the benefit of heirs, executors, administrators, successors, and assigns of Grantors and Grantee.

Executed on this 22nd day August, 2024.

Grantors (Servient Tenement)

Floyd Murray — 8/22/24

Floyd Murray, Husband — **Date**

[signature] — 8/22/24

Tiffany Hamilton, Wife — **Date**

*See attached CA Notary Acknowledgment

Grantee (Dominant Tenement)

Lilian Trujillo — 8.28.24

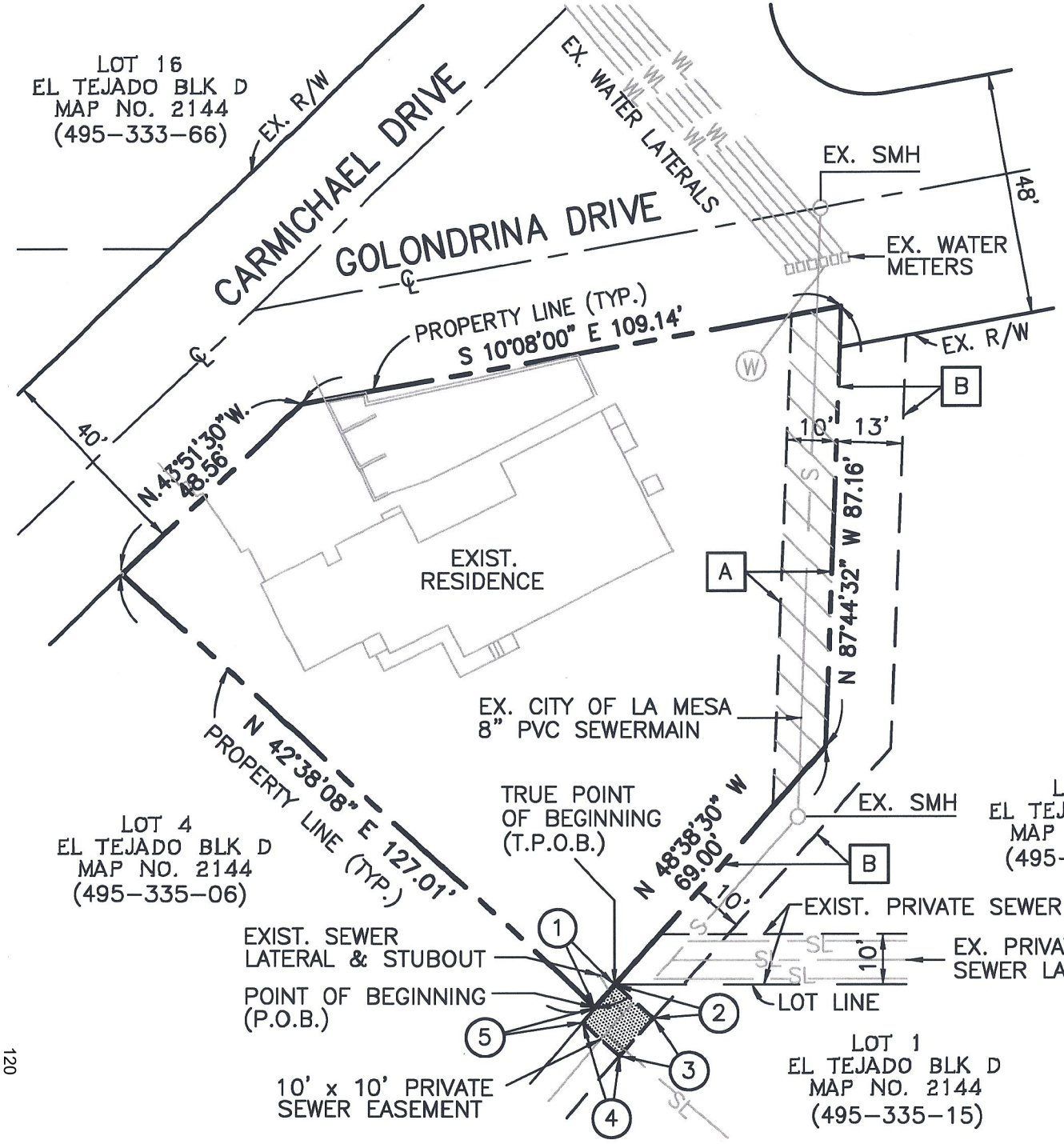
AJX Homes 1, LLC, A California Limited Liability Company, Grantee
Lilian Trujillo, Managing Member — **Date**

See Attached Notary Acknowledgements

EXHIBIT "A"

PRIVATE SEWER EASEMENT PLAT

POR. LOT 1 EL TEJADO BLK D, MAP NO. 2144



EXIST. EASEMENT DATA:

A — EX. 10' WIDE SEWER EASEMENT GRANTED TO THE CITY OF LA MESA PER DOC. NO. 86-61009, REC'D 12/1/1988.

B — EXISTING 10'-13' WIDE SEWER EASEMENT GRANTED TO THE CITY OF LA MESA PER DOC NO. 75-276834, REC'D 10/8/1975.

PRIVATE SEWER EASEMENT DATA:

1. S. 48°38'30" E. 6.10'
2. S. 41°21'30" W. 10.00'
3. N. 48°38'30" W. 10.00'
4. N. 41°21'30" E. 10.00'
5. S. 48°38'30" E. 3.90'

APPLIED CONSULTANTS

CALIFORNIA NOTARY ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of San Diego

On August 22, 2024 before me, Merci M. Carter Notary Public,

personally appeared Floyd Murray and Tiffany Hamilton
Name of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature _____

(Seal)

MERCI M. CARTER
Notary Public - California
San Diego County
Commission # 2437646
My Comm. Expires Feb 9, 2027

Optional

Description of Attached Document

Title or Type of Document: Easement Agreement

Document Date: August 22, 2024

Number of Pages: 5 pages total

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California
County of San Diego)

On August 28, 2024 before me, Jacqueline M.C. Rivera, Notary Public
(insert name and title of the officer)

personally appeared Lilian Trujillo----------,
who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

JACQUELINE M.C. RIVERA
COMM. #2382669
NOTARY PUBLIC-CALIFORNIA
SAN DIEGO COUNTY
My Commission Expires
DECEMBER 7, 2025

Signature _____ (Seal)

7a

AGENDA REPORT
Business | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Keene Simonds, Executive Officer
Meghan Traynor, Analyst I

SUBJECT: **Proposed "Bowles – N. Broadway Out-of-Agency Wastewater Services" | City of Escondido (OAS 25-14)**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider a request from the City of Escondido to provide new out-of-agency wastewater service to a 1.2-acre parcel in unincorporated Hidden Meadows. The affected territory at 3216 North Broadway – a single-family residence within Escondido's sphere of influence and 0.2 miles from the City limits – requires the service to support planned demolition and reconstruction of the existing home and addition of an accessory dwelling unit. Staff recommends approval with standard terms, while waiving the typical requirement for the landowner to file a future annexation proposal due to local conditions detailed in the report. Staff further recommends the Commission find the project categorically exempt from environmental review under State CEQA Guidelines Section 15319(b).

BACKGROUND

Legislation + Local Policy

State statute requires cities and special districts to obtain LAFCO approval before providing out-of-agency services by contract, subject to limited exemptions. Agencies may be authorized to serve territory within their spheres of influence in anticipation of future

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

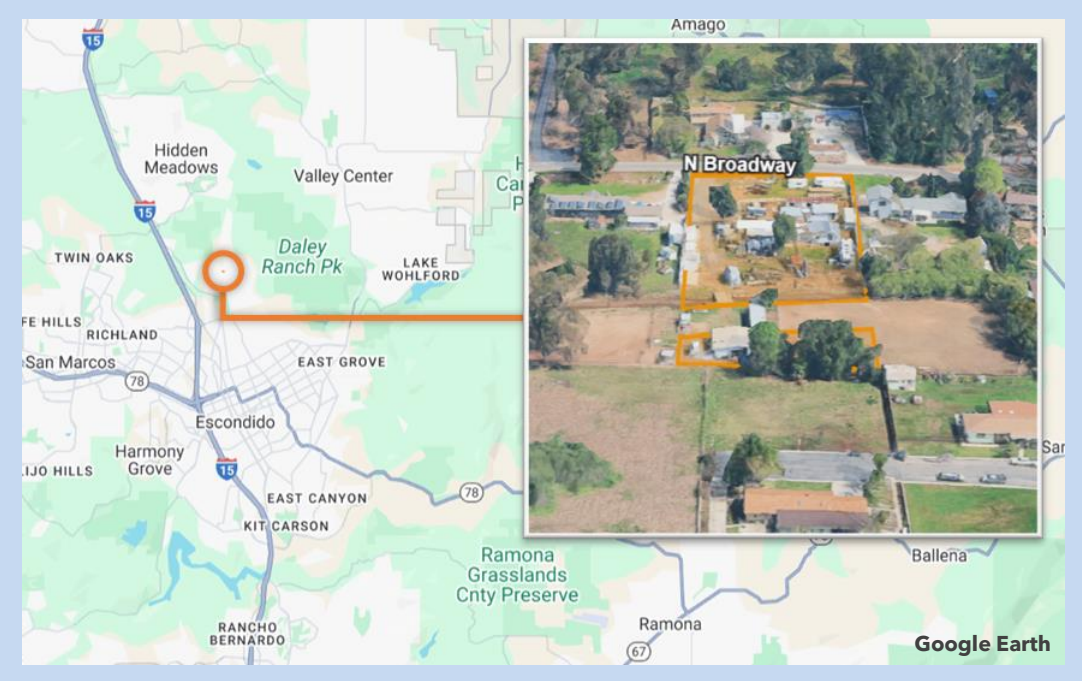
Paloma Aguirre, County of San Diego
Joel Anderson, County of San Diego
Monica M. Steppe, Alt., County of San Diego
Kristi Becker, City of Solana Beach
Dane White, City of Escondido
John McCann, Alt., City of Chula Vista
Chair Stephen Whitburn, City of San Diego
Marni von Wilpert, Alt., City of San Diego
Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

annexation. Outside their spheres, services may only be authorized in response to documented threats to public health and safety.

San Diego LAFCO's policies authorize the Executive Officer to approve out-of-agency water and wastewater service requests involving documented and direct threats to public health, safety, or welfare, with such administrative approvals reported to the Commission for information only. All other out-of-agency service requests require Commission approval.

Applicant Request

The City of Escondido requests San Diego LAFCO's authorization on behalf of landowner Mer Bowles to provide new out-of-agency wastewater service to a 1.2-acre parcel at 3216 North Broadway in unincorporated Hidden Meadows. The affected territory – developed with a 576 square-foot single-family residence – lies within Escondido's sphere of influence but separated by the City limits by nearly 0.2 miles with several other unincorporated properties in between. The subject parcel is identified by the County Assessor as 187-500-59.



Escondido's request is premised on supporting the demolition and reconstruction of the existing single-family residence and addition of an accessory dwelling unit (ADU). LAFCO staff has also separately consulted with the County's Department of Environmental Health and Quality (DEHQ), which has indicated the proposed development cannot be supported by the existing septic system and recommended an out-of-agency wastewater service request proceed to mitigate a potential public health and safety concern, with details footnoted.[1]

[1] DEHQ has advised replacing the existing septic system is infeasible given physical and environmental constraints on the site, including the presence of an intermittent stream fed by Reidy Creek located behind the home that requires a 100-foot setback, the area's history of high groundwater levels, and the existing onsite system currently being out of compliance.

DISCUSSION

San Diego LAFCO will consider approving the City of Escondido's request under Government Code Section 56133 to provide new out-of-agency wastewater services (collection, treatment, and disposal) to the affected territory. The Commission may approve the request with or without terms, provided any conditions do not directly regulate land use, property development, or subdivision requirements.

Proposal Purpose

The request would authorize wastewater service to support the planned demolition and reconstruction of the existing single-family residence and addition of an ADU.

Current and Planned Land Uses

The affected territory is currently developed with a single-family residence built in 1945. Both the County and Escondido have established land use policies providing for low-density single-family residential uses:

- The County General Plan designates the property as Semi-Rural Residential (Sr-1) with corresponding Rural Residential (RR) zoning. This zoning establishes a 1.0-acre minimum lot size with provisions permitting an ADU.

- The Escondido General Plan designates the property as Estate I with corresponding pre-zoning of Residential Agriculture. This zoning establishes a 5.0-acre minimum lot size with provisions permitting an ADU.

The planned development is consistent with these land use policies.[2]

ANALYSIS

San Diego LAFCO's current sphere of influence designation for the City of Escondido to include the affected territory focuses the analysis on the (a) timing of the requested out-of-agency service extension and (b) whether discretionary terms are appropriate. The Commission must also consider other relevant statutes as detailed below.

Policy Consideration | Timing of the Out-of-Agency Wastewater Service

The Commission must determine whether extending municipal wastewater service is merited and readily available, and if so, whether the service should be provided through annexation or out-of-agency extension. Staff's analysis of these factors follows.

[2] The affected territory is not within a disadvantaged unincorporated community.

- Need and Availability of Service
  The affected territory consists of an existing single-family residence within a developing, urbanizing unincorporated area that is expected to eventually annex into Escondido. The projected wastewater demand is 250 gallons per day for the current residence (existing or rebuilt), expanding to 500 gallons per day with the planned ADU. This amount plus all other existing flows contributes to projected systemwide average daily demand of 12.5 million gallons per day (MGD) and well below Escondido's 18.0 MGD capacity at the Hale Avenue Resource Recovery Facility. The need for wastewater service and available capacity support the out-of-agency agreement.

- Out-of-Agency Service v. Annexation
  Annexation is the preferred method under LAFCO law for formalizing service relationships unless local conditions suggest otherwise. Here, local conditions justify out-of-agency service as the most effective means given that annexation would not be orderly or efficient at this time. Most notably, the affected territory is non-contiguous to Escondido, and at least six additional unincorporated properties along North Broadway would need inclusion for connectivity (cherry-stem annexations are prohibited under LAFCO statute).

Policy Consideration | Potential Terms

Staff recommends conditioning approval to accommodate only the planned single-family residence and ADU, with standard approval terms including payment of outstanding fees per the LAFCO fee schedule. (Any additional uses – including but not limited to, junior ADUs, childcare facilities or other allowances contemplated under zoning are not covered.) Staff further recommends dispensing with the typical requirement for the landowner to file a future annexation proposal given the impracticability of orderly annexation at this time.

RECOMMENDATION

It is recommended San Diego LAFCO conditionally approving the out-of-agency wastewater service authorization to allow the City of Escondido to provide new service to the affected territory in support of the planned reconstruction and ADU development, consistent with Alternative One below.

ALTERNATIVES FOR ACTION

The following alternative actions are available to San Diego LAFCO and can be accomplished through a single-approved motion.

Alternative One (recommended):

a) Approve the out-of-agency wastewater service authorization between the City of Escondido and the landowner at 3216 North Broadway subject to the scope and terms provided in preceding sections.

b) Authorize the Executive Officer to file a Notice of Exemption, finding the request qualifies as a "project" under the California Environmental Quality Act but is exempt from further review under State CEQA Guidelines Section 15319(b) as it will accommodate no more than two dwelling units.

Alternative Two:
Continue item to a future meeting.

Alternative Three:
Disapprove of the request.

PROCEDURES

This item has been placed on the agenda for action as part of San Diego LAFCO's business calendar. The following procedures are suggested in consideration of this item:

1) Receive verbal report from staff unless waived.
2) Invite any interested parties to testify.
3) Discuss item and consider recommendation.

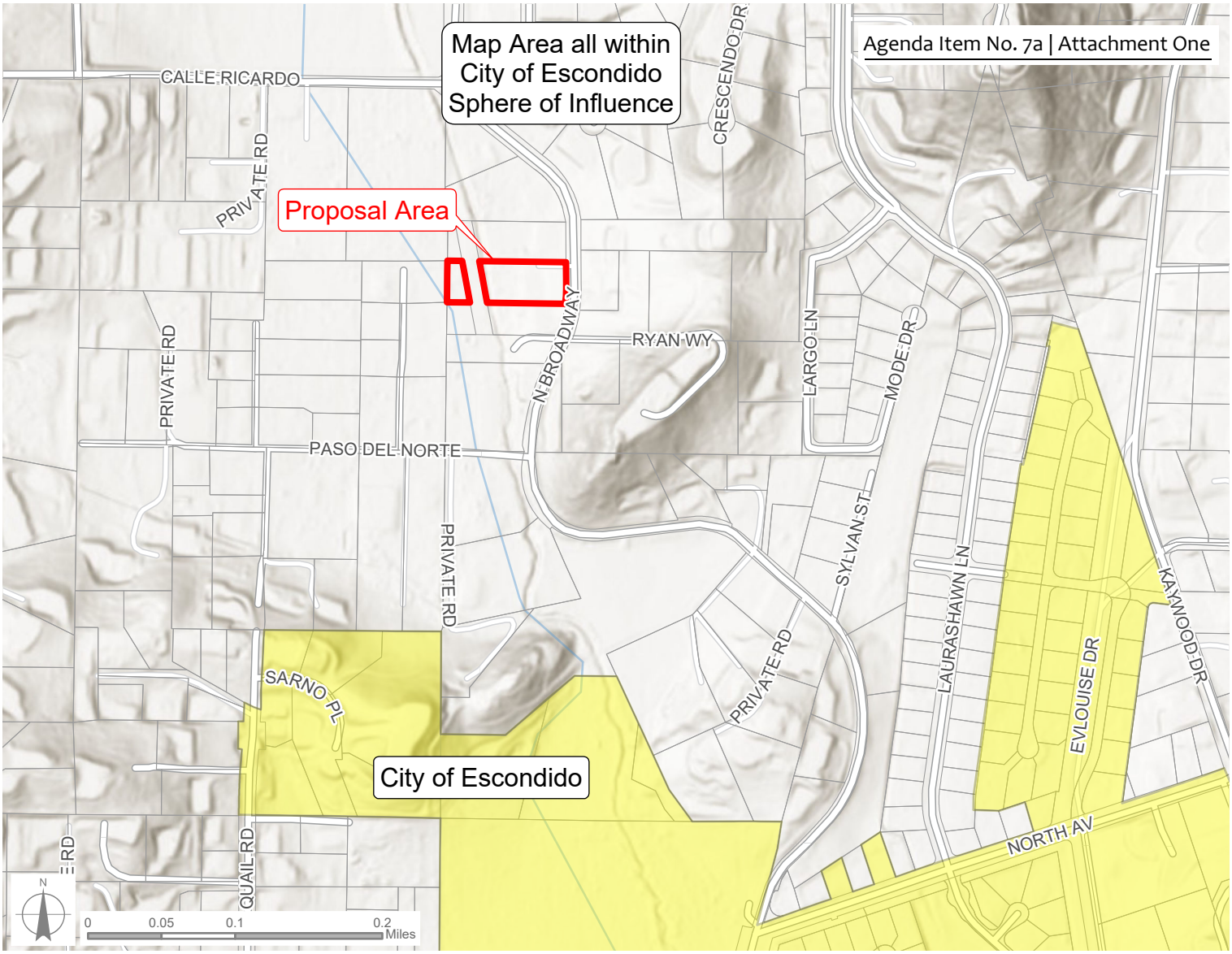
On behalf of the Executive Officer,

Meghan Traynor
Analyst I

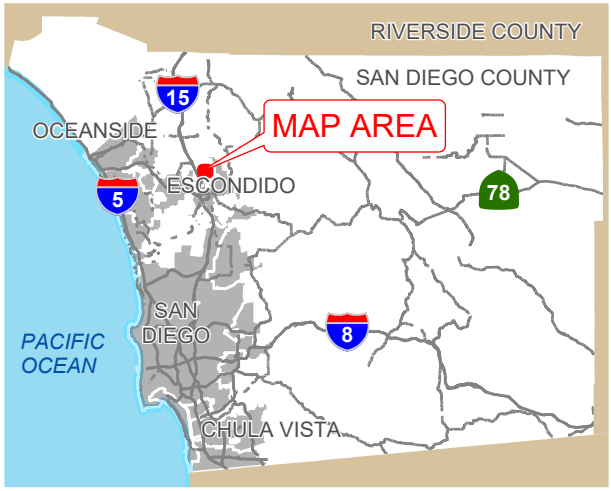
Attachments:

1) Map of the Affected Territory
2) Related Request Documents

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OAS25-14

"BOWLES - N. BROADWAY OUT-OF-AGENCY WASTEWATER SERVICES" | CITY OF ESCONDIDO

Proposal Area
City of Escondido

This map is provided without warranty of any kind, either express or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose. Copyright LAFCO and SanGIS. All Rights Reserved.This product may contain information from the SANDAG Regional Information System which cannot be reproduced without the written permission of SANDAG. This map has been prepared for descriptive purposes only and is considered accurate according to SanGIS and LAFCO data.

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Created by Dieu Ngu -- 8/22/2025

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CONTRACTUAL SERVICE AGREEMENT APPLICATION FORM

In addition to the materials required for any change(s) of organization, submit the following items:

1. One copy of either an approved Resolution of the City Council/District Board of Directors or a letter from the City Manager/District General Manager requesting approval for a contractual service agreement.

2. One copy of the contract or agreement stipulating the terms and conditions of extending service to the property signed by the property owner(s) and the agency that is to provide the service.

3. LAFCO processing fee. Contact the LAFCO office or refer to fee schedule.

Print/Type Name: MARIANN (MER.) BOWLES

Property Address: 3216 N. Broadway, Escondido, 92026

Phone #: 760-594-1038 Date: 7/11/25

This application is used by LAFCO staff to provide supplemental information for contractual service agreement requests.

1. What type or types of public service(s) will be provided? WASTEWATER

2. Why is the service needed? If the service agreement is in response to an emergency health and safety situation, such as a failed septic system, provide information documenting the circumstances (e.g., letter from the County Department of Environmental Health).

3. If a jurisdictional change, such as annexation, is not possible at this time, explain the circumstances that prevent annexation and when the jurisdictional change is anticipated. OAS.

4. Are there any jurisdictional issues associated with the proposed contractual service agreement? ☐ YES ☒ NO
(If yes, please complete the LAFCO Policy L-107 form)

San Diego Local Agency Formation Commission
2550 Fifth Ave., Suite 725
San Diego, CA 92103
(619) 321-3380

Revised November 2022

RECEIVED
JUL 14 2025
SAN DIEGO LAFCO

Sean McGlynn
City Manager
201 North Broadway, Escondido, CA 92025
Phone: 760-839-4631 Fax: 760-839-4578

June 26, 2025

Keene Simonds, Executive Officer
San Diego LAFCO
2550 Fifth Ave, Suite 725
San Diego, CA 92103

RE: Request for LAFCO Approval of an Out-of-Agency Service Agreement – 3216 N Broadway, Escondido CA 92026

Mr. Simonds:

The City of Escondido has received a request from an affected landowner for an extension of City sewer service to unincorporated territory outside of the City's boundaries and within the City's sphere of influence in anticipation of a later change of organization to annex the property. Your Commission's approval is requested for the proposed out-of-agency sewer service agreement and extension of sewer service outside the City's boundaries.

The affected property is located at 3216 N Broadway and includes one unincorporated parcel (APN 187-500-59-00) developed in 1945 with one single-family residence that utilizes an underground septic disposal system. In a letter dated April 22, 2025, the San Diego County Department of Environmental Heath (DEH) confirmed that a potential replacement of the property's aging septic disposal system was infeasible due to high groundwater conditions and proximity to Reidy Creek, which traverses the property north to south. The DEH letter requests connection of the property to public sewer to minimize possible environmental and public health risks.

The City of Escondido has sewer service available to the subject property from adjacent infrastructure within North Broadway. The property owner would be responsible for all connection costs and fees. Attached to this request letter are copies of the DEH status letter for the property, and Escondido's standard Out-of-Agency Service Agreement template which specifies all terms and conditions for proposed extensions of City sewer service.

After receiving LAFCO's *Certificate of Approval for an Out of Agency Service Agreement,* the sewer service agreement for the subject property would proceed to the Escondido City Council for consideration. Following Council approval, the executed sewer service agreement would be recorded by the County Recorder and connection of the property to the City's sewer collection system would be allowed per the terms and conditions of the service agreement. A copy of the recorded service agreement would be forwarded to the LAFCO office.

Please contact Robert Barry with the City of Escondido at 760-839-4537 or Robert.Barry@Escondido.gov should you have any questions or require additional information regarding this request.

Sincerely,

Sean McGlynn
City Manager

Enclosures

Cc: Christopher W. McKinney, Deputy City Manager
Veronica Morones, City Planner

AMY HARBERT
DIRECTOR

DEPARTMENT OF ENVIRONMENTAL HEALTH AND QUALITY
P.O. BOX 129261, SAN DIEGO, CA 92112-9261
Phone: (858) 505-6700 or (800) 253-9933 Fax: (858) 505-6786
www.sdcdeh.org

HEATHER BUONOMO, REHS
DIRECTOR OF ENVIRONMENTAL HEALTH

April 22, 2025

Mariann Bowles
3216 N. Broadway,
Escondido, Ca. 92026

RE: LAFCO Inquiry

Site Adress: 3216 N. Broadway, Escondido Ca. 92026
APN: 187-500-59-00

Dear Mrs. Bowels

The Department of Environmental Health and Quality (DEHQ) conducted a site consultation in February of 2024 regarding your onsite wastewater treatment system (OWTS) that serves your existing residence at the property referenced above. The goal of the consultation was to determine whether replacing the aging system was feasible, and if there was any opportunity to add additional occupancy to the property. Are evaluation of the property revealed that the level of seasonal groundwater exceeds the minimum allowed for OWTS installation, and DEHQ has determined that there is no suitable location on the property for replacement OWTS. If a sewer connection is available for this property, DEHQ requests that your local water agency facilitate connection as soon as possible to minimize the risk to public health and the environment due to the OWTS proximity to groundwater and Reidy creek.

If there are any questions, I can be reached at 619-366-1590 or conner.jordan@sdcounty.ca.gov

Sincerely,

Conner Jordan
Environmental Health Specialist
Land Use Program

Cc: J. Burila, R. Barry

EXEMPT FROM FEES pursuant to Gov't Code §§ 6103, 27383, and 27388.1 (filing requested/executed by municipality) RECORDING REQUESTED BY AND WHEN RECORDED RETURN TO: Planning Division City of Escondido 201 North Broadway Escondido, CA 92025-2798	*This Space for Recorder's Use Only*

APN: _____

OUT-OF-AGENCY SERVICE AGREEMENT

This OUT-OF-AGENCY SERVICE AGREEMENT ("**Agreement**") is made and entered into as of the last signature date set forth below ("**Effective Date**"), by and between the City of Escondido, a California municipal corporation ("**City**") and [insert owner name and entity designation, if applicable; e.g., Jane Homeowner, an individual; Propertyco, LLC, a California limited liability company] (collectively referred to herein as "**Owner**"). (The City and Owner may each be referred to herein as a "**Party**" and collectively as the "**Parties**.")

RECITALS

A. Owner possesses and owns that certain real property located at _____, which is outside the jurisdictional boundary of the City, and within the unincorporated County of San Diego, as further described in Exhibit A to this Agreement, attached hereto and incorporated herein by this reference ("**Property**").

B. Pursuant to California Government Code section 56133(a), the City may provide new or extended services outside its jurisdictional boundary only if it first requests and receives written approval from the San Diego County Local Agency Formation Commission ("**LAFCO**").

C. Pursuant to California Government Code section 56133(b), LAFCO may authorize the City to provide new or extended services outside its jurisdictional boundary but within its sphere of influence in anticipation of a later change of organization.

D. In accordance with California Government Code section 56133 and LAFCO's local policies, in a letter dated _____, which is attached hereto as Exhibit B and incorporated herein by this reference ("**Conditional Approval Letter**"), LAFCO provided a conditional approval for the City to establish contract wastewater service for the Property, limited to the existing one dwelling unit on the Property and subject to the LAFCO conditions stated therein.

E. The City and the Owner desire to enter into this Agreement so the City may provide wastewater service to the existing one dwelling unit on the Property, subject to Owner meeting all of the LAFCO conditions and any conditions otherwise expressed in this Agreement.

AGREEMENT

NOW, THEREFORE, in consideration of the mutual covenants, promises, terms, and conditions set forth herein, the Parties hereby mutually agree as follows:

1. Recitals. The Recitals set forth above are included herein by reference as part of this Agreement and the Parties agree that said Recitals are essential facts to this Agreement.

2. Applicability of Government Code. This Agreement is made pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act (California Government Code section 56000 et seq.) ("**Act**") and is subject to all of the provisions of the Act, including but not limited to Government Code section 56133.

3. Authority to Connect. Upon the Parties' execution of this Agreement and Owner's recordation of this Agreement in the County Recorder's Office for San Diego County, and subject to all other terms and conditions of this Agreement, Owner may connect to the City's sewer and water system ("**Improvements**"). Owner agrees to construct the Improvements in conformance with all applicable federal, state, and local laws and regulations. No construction of the Improvements shall occur without first securing all required permits and approvals from the City, County, or any other local agency or regulatory authority, and without first completing environmental review pursuant to the California Environmental Quality Act ("**CEQA**").

4. Irrevocable Offer of Annexation. Owner hereby makes an irrevocable offer of annexation of the Property to the City. Owner waives any right of protest in the annexation of the Property to the City provided for under the Act or any other law or policy. Such waiver shall be binding on Owner and its heirs, successors in interests, and assigns.

5. Conditions of Approval. This Agreement shall be subject to all LAFCO conditions:

a. Owner agrees to meet all LAFCO conditions, including each of the following:

(i.) Owner shall provide LAFCO a completed contractual service agreement form along with the required application filing fee.

(ii.) Owner shall provide LAFCO a landowner-petition application to annex the Property to the City ("**Annexation Petition**"), along with the required filing fee.

(iii.) Owner shall provide LAFCO a signed copy of this Agreement.

b. Within 10 days after execution of this Agreement by all Parties, Owner shall record this Agreement with the Office of the County Recorder for San Diego County.

c. Owner shall execute and record an agreement approved by LAFCO that consents to annexation of the Property into the City, which Agreement shall run with the land and inure to and bind all successors in interest to the Property. Owner shall undertake all prezoning and associated environmental review and pay all associated City and LAFCO fees related to the annexation of the Property.

d. As a condition to annexation, Owner shall apply to the City to have the

Property prezoned, a discretionary act that will require environmental review. At the time Owner files an Annexation Petition, Owner shall file a formal application for prezoning with the City and shall diligently and in good faith prosecute such application to completion.

e. Owner shall be responsible for all LAFCO and City fees and charges in relation to the application for prezoning, application for annexation, Improvements, future wastewater service connection, or otherwise in relation to this Agreement.

f. This Agreement is limited to the provision of wastewater service to the existing one dwelling unit on the Property and shall not be construed to provide authority for the City's provision of any additional service in relation to the Property.

6. No Pre-Commitment; Final Action Subject to Environmental Review.

a. Notwithstanding any other provision of this Agreement, nothing herein shall commit or otherwise require the City, or be interpreted as requiring the City, to issue any permit, entitlement, or other approval in relation to the Improvements. Rather, the City and Owner acknowledge and agree that the City retains full discretionary authority with respect to the Improvements, and may approve, disapprove, modify, or condition the Improvements, or any portion thereof, as otherwise authorized by law. Owner acknowledges and agrees that it is proceeding at its own risk and expense until such time as all required permits, entitlements, or other approvals are approved and without assurance that any required permits, entitlements, or other approvals will be approved.

b. The City shall not enter into any agreement that will allow for the construction of the Improvements until there has been appropriate compliance with CEQA. The City, through the planning process with Owner as to the Improvements, will identify the actions and activities that would be necessary to construct the Improvements and thereby facilitate meaningful environmental review.

7. Term. This Agreement shall commence on the Effective Date and shall remain in effect until the earlier of any of the following: (i) the Property is annexed into the City; or (ii) the Agreement is terminated by the City if Owner fails to meet any condition stated herein.

8. Indemnification. Owner (including Owner's agents, employees, contractors, and subcontractors, if any) shall hold harmless, defend (with counsel reasonably acceptable to the City), and indemnify the City, its boards, commissions, departments, officials, officers, agents, employees, and volunteers from and against any and all claims, demands, actions, causes of action, proceedings (including but not limited to legal and administrative proceedings of any kind), suits, fines, penalties, judgments, orders, levies, costs, expenses, liabilities, losses, damages, or injuries, in law or equity, including without limitation the payment of all consequential damages and attorney's fees and other related litigation costs and expenses (collectively, "**Claims**"), and any attorney's, consultant, or expert fees and City staff costs for investigating or responding to any Claims, incurred in connection with or arising in whole or in part from this Agreement, the use of the Improvements by the Owner (including Owner's agents, employees, invitees, contractors, and subcontractors, if any), the condition of the Improvements, or any related construction or other work undertaken on the Property, including without limitation (i) any death or bodily injury to a person; (ii) any injury to, loss, or theft of tangible or intangible property, including economic loss; or (iii) any other loss, damage, or expense sustained by the Owner in connection with any work or obligations performed in connection with

this Agreement, except for any liability resulting from the active negligence, sole negligence, or willful misconduct of the City. The duty to defend the City as described in this Paragraph 10 shall apply regardless of whether any Claims are groundless, fraudulent, or false. All obligations under this Paragraph 10 shall survive the termination of this Agreement.

9. Miscellaneous.

12.1 *Governing Law*. This Agreement and all rights and obligations arising out of it shall be construed in accordance with the laws of the State of California. Any litigation arising out of this Agreement shall be conducted only in the state or federal courts of San Diego County, California.

12.2 *Entire Agreement*. This Agreement, together with its attachments or other documents, if any, described or incorporated herein, contains the entire agreement and understanding concerning the subject of this Agreement and supersedes and replaces all prior negotiations, understandings, or proposed agreements, written or oral, except as otherwise provided herein. Each of the Parties hereto acknowledges that no other Party, nor the agents nor the attorneys for any Party, has made any promise, representation or warranty whatsoever, express or implied, not contained herein, to induce the execution of this Agreement and acknowledges that this Agreement has not been executed in reliance upon any promise, representation, or warranty not contained herein.

12.3 *Amendment*. This Agreement may not be amended except in a writing signed by all of the Parties hereto, and then only in the specific instance and for the specific purpose given. Any such amendment shall be recorded with the Office of the County Recorder for the County of San Diego.

12.4 *Independent Investigation*. The Parties acknowledge that they have conducted an independent investigation of the facts concerning the subject matter of this Agreement. The Parties agree that the factual recitals are correct and expressly assume the risk that the true facts concerning the foregoing may differ from those currently understood by them.

12.5 *Advice of Counsel*. The Parties hereby acknowledge that they have executed this Agreement after having the opportunity to consult with, and receive the advice of, their own counsel.

12.6 *Capacity*. Each individual signing this Agreement represents and warrants that he or she has been authorized to do so by proper action of the Party on whose behalf he or she has signed.

12.7 *Headings*. Section headings are for reference purposes only and shall not be used for interpreting the meaning of any provisions of this Agreement.

12.8 *Attorney's Fees*. In any action to enforce the terms of this Agreement, the Parties agree that the prevailing party shall be entitled to its reasonable attorney's fees and all costs, fees, and expenses, including the fees of expert witnesses and consultants, whether or not such costs, fees, and expenses are recoverable or allowed as costs under section 1033.5 of the California Code of Civil Procedure. In addition to the foregoing award of attorney's fees and costs, the prevailing party shall be entitled to its attorney's fees and costs incurred in any post-judgment proceedings to collect or enforce any judgment. This provision is separate and shall survive the merger of this

provision into any judgment on this Agreement.

12.9 *Counterparts*. This Agreement may be executed on separate counterparts that, upon completion, may be assembled into and shall be construed as one document.

12.10 *Severability*. This Agreement shall be performed and shall be enforceable to the full extent allowed by applicable law, and the illegality, invalidity, waiver, or unenforceability of any provision of this Agreement shall not affect the legality, validity, applicability, or enforceability of the remaining provisions of this Agreement.

12.11 *Notice*. All notices, demands, approvals, or consents provided for in this Agreement shall be in writing and delivered to the appropriate Party at its address as follows:

If to the City:

Director of Development Services
City of Escondido
201 N. Broadway
Escondido, CA 92025

If to Owner:

[Owner Name
Owner Address
Owner Address]

Any notice, delivery, or other communication shall be effective and shall be deemed to be received by the other Party within five business days after the notice has been deposited in the U.S. Mail, duly registered or certified, with postage prepaid, and addressed as set forth above. Any Party may change the address information provided above by giving written notice to the other Party in the manner provided in this Agreement.

12.12 *Covenants Run with Land*. So long as this Agreement remains in effect, the obligations and benefits provided for in this Agreement shall run with the land obligated and benefited, respectively, and shall be binding on all parties having or acquiring any right, title, or interest in the Property or any part thereof. As such, it is the intent of the Parties that this Agreement and the promises, covenants, rights, and obligations set forth herein (i) shall be and are covenants running with the Property, encumbering the Property for the term of this Agreement, binding upon the Owner's successors in title and all subsequent owners and operators of the Property; (ii) are not merely personal covenants of the Owner; and (iii) shall bind the Owner and its respective successors and assigns during the term of this Agreement. Further, the Owner shall ensure that any future transfer of interest in the Property is made subject to the terms of this Agreement, such that any future successor in title or owner or operator of the Property shall be bound by the terms herein.

12.13 *Effective Date*. Unless a different date is provided in this Agreement, the effective date of this Agreement shall be the latest date of execution set forth by the names of the signatories below.

(SIGNATURE PAGE FOLLOWS)

IN WITNESS WHEREOF, this Agreement is executed by the Parties or their duly authorized representatives as of the Effective Date:

CITY OF ESCONDIDO

Date: _____ By_____
Dane White, Mayor

OWNER(s)

Date: _____ By_____
[Name, Title]

Date: _____ By_____
[Name, Title]

(ABOVE SIGNATURES MUST BE NOTARIZED; ACKNOWLEDGMENT PAGES FOLLOW)

APPROVED AS TO FORM:

OFFICE OF THE CITY ATTORNEY
Michael R. McGuinness, City Attorney

_____

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document, to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA]

COUNTY OF _____]

On _____, before me, _____, a Notary Public, personally appeared _____, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature: _____ (Seal)

City of Escondido

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document, to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA]

COUNTY OF _____]

On _____, before me, _____, a Notary Public, personally appeared _____, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature: _____ (Seal)

(OWNER)

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document, to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA]

COUNTY OF _____]

On _____, before me, _____, a Notary Public, personally appeared _____, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature: _____ (Seal)

(OWNER)

Exhibit A

Legal Description of Property

Exhibit B

Conditional Approval Letter

7b

AGENDA REPORT
Business | Action

November 3, 2025

TO: Chair Whitburn and Commissioners

FROM: Keene Simonds, Executive Officer
Meghan Traynor, Local Government Analyst I

SUBJECT: **Proposed "Rancho Hills Change of Organization" | Annexation to Rancho Santa Fe Community Services District and Related Actions (CO16-11)**

SUMMARY

The San Diego County Local Agency Formation Commission (LAFCO) will consider a landowner-initiated annexation of 107.0 acres comprising 44 undeveloped parcels to the Rancho Santa Fe Community Services District (CSD). The affected territory – located in unincorporated Santa Fe Valley and within the Rancho Santa Fe CSD's sphere of influence – requires public wastewater service to accommodate a planned 37-unit residential subdivision –"Rancho Hills" – conditionally approved by the County of San Diego. The proposal does not include other CSD services such as security and underground utilities. Staff recommends conditional approval as submitted and further recommends the Commission waive protest proceedings and adopt the County's environmental findings for the underlying development.

BACKGROUND

Applicant Request

Landowners Ali Shapouri and Yun Yung (Pinnacle at Santa Fe Valley LLC) have submitted a change of organization proposal to San Diego LAFCO for approval to annex 107.0 acres in the Santa Fe Valley community to the Rancho Santa Fe CSD. The affected territory comprises 44 undeveloped legal parcels with improvements limited to grading. The parcels have no

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

Paloma Aguirre, County of San Diego
Joel Anderson, County of San Diego
Monica M. Steppe, Alt., County of San Diego
Kristi Becker, City of Solana Beach
Dane White, City of Escondido
John McCann Alt., City of Chula Vista
Chair Stephen Whitburn, City of San Diego
Marni von Wilpert, Alt., City of San Diego
Vice Chair Barry Willis, Alpine Fire Protection
Jo MacKenzie, Vista Irrigation
David Drake, Alt., Rincon del Diablo
Brigette Browning, General Public
Eileen Delaney, Alt., General Public

assigned addresses; Assessor Parcel Numbers are provided as an attachment. All parcels lie within the CSD's existing sphere of influence.

Regional Setting

The affected territory is located in north-central San Diego County within unincorporated Santa Fe Valley, immediately adjacent to two residential developments: Savenna to the south and 4S Ranch to the southeast. Principal access is provided by Camino Del Sur via Camino Santa Fe and Four Gee Road. The surrounding area is predominantly low to mid residential density to the south and southeast while largely undeveloped to the north. The territory lies within County Supervisorial District 2 (Joel Anderson), Assembly District 76 (Darshana Patel), and Senate District 40 (Brian W. Jones). An aerial map follows, with a detailed map showing parcel boundaries and the CSD's jurisdictional boundary provided as Attachment One.



Google Earth

Subject Agencies

The proposed change of organization filed with San Diego LAFCO involves one subject agency: Rancho Santa Fe CSD.[1] A summary of the subject agency in terms of governance, resident population, municipal functions, and financial standing follows.

[1] State law defines "subject agency" to mean any district or city for which a change of organization or reorganization is proposed.

- **Rancho Santa Fe CSD** is an independent special district formed in 1981 through reorganization of the Rancho Santa Fe Sanitation District. The District is governed by a five-member Board and provides wastewater service (collection, treatment, and disposal) as its primary function, along with landscape maintenance, security, and utility undergrounding services. Landscape services are authorized agency-wide but currently limited to the "Village" area, contracted with the Rancho Santa Fe Association and funded through a voter-approved improvement district. Security and utility undergrounding operate through separate latent power zones. The District's jurisdictional boundary spans 16.4 square miles (10,483 acres) with an estimated resident population of 8,617. LAFCO last updated the sphere of influence in 2013 to include an additional 1,814 acres beyond the jurisdictional boundary, primarily in the 4S Ranch and Black Mountain Ranch areas. The District's current adopted budget totals $6.233 million. The most recent audit (2023-2024) shows net position of $31.4 million with an unrestricted balance of $3.9 million and cash balance of $2.4 million. Net position has decreased 10.3% over the last three audited years.

Affected Local Agencies

The affected territory presently lies within the jurisdictional boundaries and/or spheres of influence of 13 local agencies directly subject to San Diego LAFCO's planning and regulatory responsibilities. These agencies qualify as "affected agencies" relative to the proposed change of organization and are listed below.[2]

- County Service Area No. 135 (Regional Communications)
- County Service Area No. 17 (San Dieguito EMS Ambulance Transport)
- County Service Area No. 83 (San Dieguito Local Parks)
- Metropolitan Water District of Southern California
- Olivenhain Municipal Water District
- Palomar Healthcare District
- Pomerado Cemetery District
- Rancho Santa Fe Community Service District (sphere only)
- Rancho Santa Fe Fire Protection District
- Resource Conservation District of Greater San Diego
- San Diego County Flood Control District
- San Diego County Street Lighting District
- San Diego County Water Authority

The affected territory also lies within the following school and college districts and accordingly have received notice of the proposal as part of the administrative review: Poway Unified School District and Palomar Community College District.

[2] State law defines "affected local agency" as any entity that contains, or would contain, or whose sphere contains or would contain, any territory for which a change of organization is proposed or ordered. Notice of the proposal and hearing were provided to the agencies.

DISCUSSION

San Diego LAFCO will consider approving the change of organization proposal to annex the affected territory to Rancho Santa Fe CSD for wastewater service. The District's security and underground utility functions operate as separate latent power zones and would require separate LAFCO proposals. While landscape services are authorized agency-wide, they remain limited to the "Village" area. The Commission may apply approval conditions provided they do not directly regulate land use, property development, or subdivision requirements.

Proposal Purpose

The proposal would establish public wastewater service to support the planned development of a 37-unit residential subdivision consistent with County zoning regulations. The timing ties to a County condition approving the Rancho Hills development project in November 2006 requiring confirmation of wastewater service prior to issuance of building permits. No other service establishments are proposed as the affected territory already lies within Olivenhain Municipal Water District for potable water and Rancho Santa Fe Fire Protection District for integrated fire protection, rescue, and emergency medical services.

Current and Planned Land Uses

The affected territory is unincorporated and under County land use authority, with development standards delegated to the San Dieguito Community Plan (2011). The County designates the territory as Semi-Rural Residential with conforming Rural Residential zoning. The 2006 Santa Fe Valley Specific Plan established a 1.0-acre minimum lot size. (Lot splits under Senate Bill 9 are not permitted due to the territory's location outside urban areas and the substantial biological open space dedications on many lots.) Additional density is permitted through one accessory dwelling unit (ADU) up to 1,200 square feet and one junior ADU up to 500 square feet per parcel.[3]

ANALYSIS

San Diego LAFCO's current sphere of influence designation for Rancho Santa Fe CSD includes the affected territory and can readily accommodate the proposed annexation. This focuses the analysis on three considerations: (a) timing of the boundary change, (b) whether discretionary modifications or terms are appropriate, and (c) other relevant statutes.

Change of Organization Timing

San Diego LAFCO's consideration of timing draws on baseline factors required by statute and applicable Commission policies, particularly Policy L-107 regarding jurisdictional disputes.[4] An analysis of these timing factors follows.

[3] ADUs may be detached from "sponsoring" single-family residences. Junior ADUs must be attached to single-family residences.

[4] Most of the baseline factors in statute focus on disclosing and otherwise addressing compatibility issues with external goals and policies of other state, regional, and local agencies as well as assessing the ability of subject agencies to provide services going forward. (Reference to Government Code Section 56668).

- Timing Factor No. 1:
  Baseline Considerations: Regional Policies + Service Relationships

  State law requires consideration of multifaceted factors when reviewing jurisdictional changes, ranging from basic disclosures (land uses, assessed values, registered voters) to discretionary analyses evaluating the proposal's relationship to community needs, service capacities, and the receiving agency's financial resources. Key conclusions regarding (a) service needs, (b) service availability and capacity, and (c) financial considerations follow.

  - With respect to **service needs**, the present and planned land uses warrant public wastewater service and represent an orderly expansion of Rancho Santa Fe CSD's service area to accommodate the planned 37-unit residential subdivision. Annexation aligns with the landowners' request, fulfills a County development condition, and provides a preferred alternative to onsite septic systems. These factors substantiate the need and timing for the proposed change of organization.

  - With respect to **service availability and capacities**, Rancho Santa Fe CSD has sufficient wastewater capacity to accommodate projected service demands at both planned and maximum potential use. An existing CSD wastewater main is located south of the site along Tea Tree Lane, accessible via an approximately 200-foot private lateral connection. The projected average daily wastewater flow of 9,250 gallons for the 37-unit subdivision represents 2.8% of the District's available treatment capacity. Adding one allowable ADU per parcel would increase this to 5.6% of available capacity — not considered substantive.

  - With respect to **related financial considerations**, Rancho Santa Fe CSD has adequate financial resources and administrative controls to serve the affected territory without adversely impacting current ratepayers. The District's most recent audit covers 2023-2024 and shows sufficient liquidity and capital levels, with a current ratio of 7:1 and low debt ratio of 3.0%. These measurements provide reasonable assurance of effective financial management despite recent operating losses averaging a total margin of (34.6%) over the last three fiscal years.[5] Service establishment requires the landowner to pay a $10,085 connection fee, with ongoing annual service charges estimated at $1,400 for FY 2025-26 and $1,500 for FY 2026-27, collected through the County tax roll.

- Timing Factor No. 2:
  Consideration of Policy L-107

  LAFCO Policy L-107 (adopted May 2010) requires applicants to disclose jurisdictional disputes associated with their proposals. No disputes have been disclosed by Rancho Santa Fe CSD, nor has staff identified any concerns during administrative review.

[5] In 2024, a $135,067 increase in sewer management expenses exceeded by 1.6 times the $82,835 increase in property tax revenues. A $71,811 increase in sales of recycled water additionally impacted overall revenue.

CONCLUSION |
MERITS OF CHANGE OF ORGANIZATION TIMING

The timing of the change of organization to annex the affected territory to Rancho Santa Fe CSD and its wastewater function is sufficiently warranted. Justification is marked by the demonstrated need for public wastewater service to support the approved 37-unit Rancho Hills subdivision, CSD's substantial available capacity to accommodate the projected demand (representing less than 6% of available treatment capacity even at maximum buildout), and CSD's sufficient financial resources to extend service without impacting existing ratepayers. The proposal represents an orderly expansion of CSD within its established sphere of influence, with no identified jurisdictional disputes and alignment with County development conditions requiring confirmation of wastewater service prior to permit issuance. Additional analysis supporting this conclusion is provided in Appendix A.

Potential Modifications and Terms

No modifications to the submitted change of organization have been identified by San Diego LAFCO staff as meriting Commission consideration at this time. This includes confirmation annexation of the affected territory as proposed to Rancho Santa Fe CSD would not generate any corridors or otherwise illogical jurisdictional features going forward. Terms appear appropriate and include an otherwise special condition requiring the landowner to secure a necessary easement with one of their southern-facing neighbors to allow physical access to the wastewater collection main located within the public right-of-way on Tea Tree Lane. This condition ensures Rancho Santa Fe CSD can provide wastewater service to the affected territory immediately following annexation, and prevents a scenario in which the District collects wastewater charges via the property tax roll before service commences. Other standard terms are also recommended to ensure payment of any charges necessary to complete the proposal processing under the LAFCO fee schedule.

CONCLUSION |
MERITS OF MODIFICATIONS AND TERMS

No modifications to the proposal appear warranted. Approval terms are appropriate and marked by requiring the landowner to secure an easement to access the Rancho Santa Fe CSD's collection main along Tea Tree Lane. Other standard payment terms are also appropriate and incorporated into the attached draft resolution.

Other Statutory Considerations

Exchange of Property Tax Revenues

San Diego LAFCO has confirmed the County of San Diego has adopted a master agreement applicable to govern the tax exchange for the proposed change of organization.[6] The master agreement specifies no transfer of property taxes would occur following the annexation of the affected territory to Rancho Santa Fe CSD given the underlying service – wastewater – is not presently provided.

Environmental Review

San Diego LAFCO is obligated under California Environmental Quality Act (CEQA) to assess whether environmental impacts would result from activities approved under the Commission's authority, either as a lead or responsible agency. Accordingly, the Commission is tasked with making findings under CEQA in consideration of the proposed change of organization. Staff analysis follows.

- The County of San Diego serves as lead agency under CEQA for considering the change of organization and the expansion of Rancho Santa Fe CSD's wastewater service area as part of its discretion to approve the underlying development project. An Addendum to a previously certified Environmental Impact Report (EIR) was prepared and considered for this project pursuant to the provisions of CEQA, and mitigation measures and a mitigation reporting or monitoring plan was adopted for this project. In its role as lead agency, on November 1, 2006 the County certified an EIR and adopted a Notice of Determination (NOD) and in doing so made findings that the project will not have a significant effect on the environment with approved mitigation measures. Staff independently believes the County has prepared sufficient documentation as lead agency in assessing and mitigating impacts and it would be appropriate for the Commission to adopt parallel findings as responsible agency.

Protest Proceedings

Protest proceedings for the proposed change of organization may be waived by LAFCO should the Commission proceed with approval under Government Code Section 56662. The waiver appropriately applies under this statute given all of the following: the affected territory is uninhabited as defined under LAFCO law, the subject agency has not filed an objection to the waiver, and the landowner has provided written consent.[7]

RECOMMENDATION

Staff recommends San Diego LAFCO conditionally approve the change of organization proposal along with related findings as detailed below, consistent with Alternative One.

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[6] California Revenue and Taxation Code Section 99(b)(6) requires the adoption of a property tax exchange agreement by the affected local agencies before San Diego LAFCO can consider any jurisdictional change involving an annexation and/or detachment unless an applicable master agreement applies. The associated statutes also empower the County of San Diego to make all related property tax exchange determinations on behalf of special districts.

[7] LAFCO law defines uninhabited as territory in which less than 11 registered voters reside.

ALTERNATIVES FOR ACTION

The following alternative actions are available to San Diego LAFCO:

Alternative One (recommended):
Adopt the attached draft resolution conditionally approving the change of organization proposal as submitted. Adoption of the draft resolution as presented would also include waiving protest proceedings and making CEQA findings, as detailed.

Alternative Two:
Continue consideration to the next regular meeting.

Alternative Three:
Disapprove the change of organization proposal with direction to staff to return at the next regular meeting with a conforming resolution for adoption.

PROCEDURES FOR CONSIDERATION

This item has been placed on the agenda for action as part of San Diego LAFCO's business calendar. The following procedures are suggested in the consideration of this item:

1) Receive verbal report from staff unless waived.
2) Discuss item and consider recommendation.

On behalf of the Executive Officer,

Meghan Traynor
Analyst I

Appendix:

A) Analysis Proposal Review Factors

Attachments:

1) Vicinity Map of the Affected Territory
2) Draft Resolution of Approval
3) Application Materials

APPENDIX A
Government Code Section 56668
Mandatory Proposal Review Factors

a) Population and population density; land area and land use; per capita assessed valuation; topography, natural boundaries, and drainage basins; proximity to other populated areas; the likelihood of significant growth in the area, and in adjacent areas, in the next 10 years.

The affected territory as submitted comprises 44 unincorporated parcels totaling 107.0 acres in the community of Santa Fe Valley. The subject parcels are currently undeveloped with no assigned situs addresses and a total current assessed *land* value of $6,367,215 with the last transaction recorded in September 2023. A complete listing of Assessor Parcel Numbers is provided as part of Attachment 3.

b) The need for municipal services; the present cost and adequacy of municipal services and controls in the area; probable future needs for those services and controls; probable effect of the proposed incorporation, formation, annexation, or exclusion and of alternative courses of action on the cost and adequacy of services and controls in the area and adjacent areas.

The County of San Diego serves as a primary purveyor of general governmental services to the affected territory. These governmental services include community planning, roads, drainage, and law enforcement. Other pertinent service providers include Olivenhain Municipal Water District (domestic water) and Rancho Santa Fe Fire Protection District (fire protection, rescue, and emergency medical). This proposal affects only wastewater and is the focus of the succeeding analysis.

- **Extending Public Wastewater to Affected Territory**
  The affected territory is undeveloped with no active wastewater system. Connection to the Rancho Santa Fe Community Service District's wastewater infrastructure can be achieved through the extension of a private lateral through a neighboring property to the existing sewer main located along Tea Tree Lane. The projected average daily wastewater flow for the affected territory post change of organization is 9,250 gallons. The projected amount can be readily accommodated by Rancho Santa Fe CSD and represents 2.81% of their available wastewater treatment capacity. Maximum density via allowance of an accessory dwelling unit on each parcel doubles this consumption usage to 5.62% of available capacity and not considered substantive.

c) The effect of the proposed action and of alternative actions, on adjacent areas, on mutual social and economic interests, and on local governmental structure.

Approval of the proposed change of organization and annexation to Rancho Santa Fe CSD would establish economic and social ties between the District and the affected territory.

d) The conformity of the proposal and its anticipated effects with both the adopted commission policies on providing planned, orderly, efficient patterns of urban development, and the policies/priorities set forth in G.C. Section 56377.

Approving the proposed change of organization and annexation to Rancho Santa Fe CSD would facilitate the establishment of public wastewater services for the planned development of a 37-unit Rancho Hills residential subdivision and in doing so support the County of San Diego's community planning policies. Similarly, approval would be consistent with the Commission's adopted policies to sync urban uses with urban services. The affected territory does not contain "open space" as defined under LAFCO law and no conflicts exists under Government Code Section 56377. Additional analysis concerning conformance with germane Commission policies follows.

- San Diego LAFCO Policy L-107 requires applicants to disclose and address potential jurisdictional issues associated with their proposals, and if applicable, requires a consultation process with affected agencies, interested parties, or organizations to help discuss and potentially remedy concerns, unless waived by the Executive Officer. No jurisdictional disputes or related concerns were identified or disclosed by the applicant, affected agencies, or interested parties in the review of the proposal.

e) The effect of the proposal on maintaining the physical and economic integrity of agricultural lands, as defined by G.C. Section 56016.

The affected territory does not contain "prime agricultural land", or "agricultural land" as defined under LAFCO law. Specifically, the affected territory does not contain land currently used for any of the following purposes: producing an agricultural commodity for commercial purposes; left fallow under a crop rotational program; or enrolled in an agricultural subsidy program. Approval of the change of organization proposal would not adversely affect the physical or economic integrity of agricultural lands.

f) The definiteness and certainty of the boundaries of the territory, the nonconformance of proposed boundaries with lines of assessment, the creation of islands or corridors of unincorporated territory, and other similar matters.

LAFCO is in receipt of a draft map and geographic description of the affected territory that details metes and bounds that appear consistent with the standards of the State Board of Equalization and conforming with lines of assessment. LAFCO approval would be conditioned on approval of the final map and geographic description by the County Assessor's Office and address any modifications enacted by the Commission. No irregular or otherwise illogical boundary features would be generated from proposal approval.

g) A regional transportation plan adopted pursuant to Section 65080.

The proposed change of organization would provide wastewater services in support of the planned construction of a 37-unit residential subdivision consistent with current zoning. The proposal and its anticipated outcomes do not generate any known conflicts with *San Diego Forward*, the regional transportation plan adopted by SANDAG.

h) Consistency with the city or county general and specific plans.

The affected unincorporated territory is presently designated for semi-rural residential use under the adopted land use policies of the County of San Diego. The affected territory is zoned as Rural Residential, with the 2006 Santa Fe Valley Specific Plan Amendment designating a minimum parcel size of 1.0 acre. The existing and planned residential uses are consistent with the proposal's purpose to provide public wastewater to the affected territory and the development of a 37-unit residential subdivision.

i) The sphere of influence of any local agency affected by the proposal.

The affected territory lies entirely within the existing sphere of influence established for the Rancho Santa Fe Community Services District.

j) The comments of any affected local agency or other public agency.

Notice of the submitted change of organization proposal was distributed to all affected and subject agencies as required under LAFCO law. Notices were also provided to all local college and school districts. No written comments on the proposal were received ahead of preparing this agenda report for distribution on October 27, 2025.

k) The ability of the newly formed or receiving entity to provide the services that are the subject of the application to the area, including the sufficiency of revenues for those services following the proposed boundary change.

Information collected and reviewed as part of this proposal indicates Rancho Santa Fe CSD has sufficient and available financial resources and administrative controls therein relative to serving the affected territory without adversely impacting existing constituents. This statement is supported by the following factors.

- Rancho Santa Fe CSD's last audit covers FY 2023-2024 and shows the District finished with strong liquidity levels with an agency-wide current ratio of 7.1 (i.e. $7.10 in current assets for every $1.00 in current liabilities).

- Rancho Santa Fe CSD finished FY 2023-2024 with strong capital levels marked by a low debt ratio of 3.0% (i.e. only $3.00 out of every $100.00 in net assets are financed).

- Rancho Santa Fe CSD finished FY 2023-2024 with an overall total margin of (34.6%).[8]

l) Timely availability of adequate water supplies for projected needs as specified in G.C. Section 65352.5.

The affected territory already lies within Olivenhain MWD's jurisdictional boundary, and as such is eligible to proceed with a connection to the potable water system at any time.

[8] In 2024, a $135,067 increase in sewer management expenses exceeded by 1.6 times the $82,835 increase in property tax revenues. A $71,811 increase in sales of recycled water additionally impacted overall revenue.

Similarly, the affected territory lies within the two regional wholesale providers boundaries: San Diego County Water Authority and Metropolitan Water District of Southern California.

m) The extent to which the proposal will affect a city or cities and the county in achieving their respective fair shares of the regional housing needs as determined by the appropriate council of governments.

The proposed change of organization would not impact any local agencies in accommodating their regional housing needs.

n) Any information or comments from the landowners, voters, or residents.

The affected territory is considered uninhabited as defined by LAFCO law (containing 11 registered voters or less). The landowners support the proposed change of organization and have provided written consent to the proceedings as the petitioners.

o) Any information relating to existing land use designations.

See above analysis for (h).

p) The extent to which the proposal will promote environmental justice.

The change of organization is expected to have a positive impact on environmental justice by enhancing wastewater services within the affected territory and for any groups that are susceptible to pollution burdens and their effects. Consideration of existing environmental justice factors within the affected territory draws on staff analyzing data available from the California Environmental Protection Agency through its online assessment tool (CalEnviroScreen 4.0). Two composite percentile rankings for the affected territory are generated within this analysis and involve (a) pollution burdens and (b) susceptible population to pollution burdens relative to all census tracts in California.

- The affected territory's **composite pollution burden ranking** falls in the 51st percentile. Five individual pollution burden indicators exceed the 50th percentile and are considered elevated, including pesticides, traffic density, cleanup sites, groundwater threats, hazardous waste, and impaired water. Of these, impaired water ranks above the 90th percentile, indicating a very high impact. This further reinforces the benefit of the proposal in providing wastewater service to the affected territory, thereby avoiding potential pollutants to local waterways caused by on-site septic systems.

- The affected territory's **composite susceptible population** ranking falls in the 16th percentile. Two sensitive population indicators exceed the 50th percentile and are considered elevated: unemployment and housing burden.

A summary of all tracked pollution burdens and susceptible populations follows.

Census Tract No. 6073017030 Pollution Burdens and Susceptible Population (Source: California Environmental Protection Agency and SD LAFCO)	
	Affected Territory + Surrounding Lands
Census Tract No.	6073017030
Estimated Population	25,348
Pollution Burden	Weighted Percentile
… Percentile	50.62
Indicator | Air Quality: Ozone	48.70
Indicator | Air Quality: PM 2.5:	16.35
Indicator | Air Quality: Diesel PM:	22.74
Indicator |Pesticides:	**60.34**
Indicator | Toxic Releases:	10.34
Indicator |Traffic:	**57.76**
Indicator | Drinking Water Contaminants:	38.47
Indicator | Lead in Housing:	2.47
Effects | Cleanup Sites:	**58.19**
Effects | Groundwater Threats:	**63.37**
Effects | Hazardous Waste:	**62.48**
Effects | Impaired Water:	**99.03**
Effects | Solid Waste:	35.72
Sensitive Population	Weighted Percentile
… Percentile	15.62
Population | Asthma:	6.66
Population | Low Birth Weight:	40.47
Population | Cardiovascular Disease:	14.68
Population | Education:	8.42
Population | Linguistic Isolation:	36.97
Population | Poverty:	12.45
Population | Unemployment:	**53.89**
Population | Housing Burden:	**53.12**

q) Information contained in a local hazard mitigation plan, information contained in a safety element of a general plan, and any maps that identify land as a very high fire hazard zone or maps that identify land determined to be in a state responsibility area, if it is determined that such information is relevant to the affected territory.

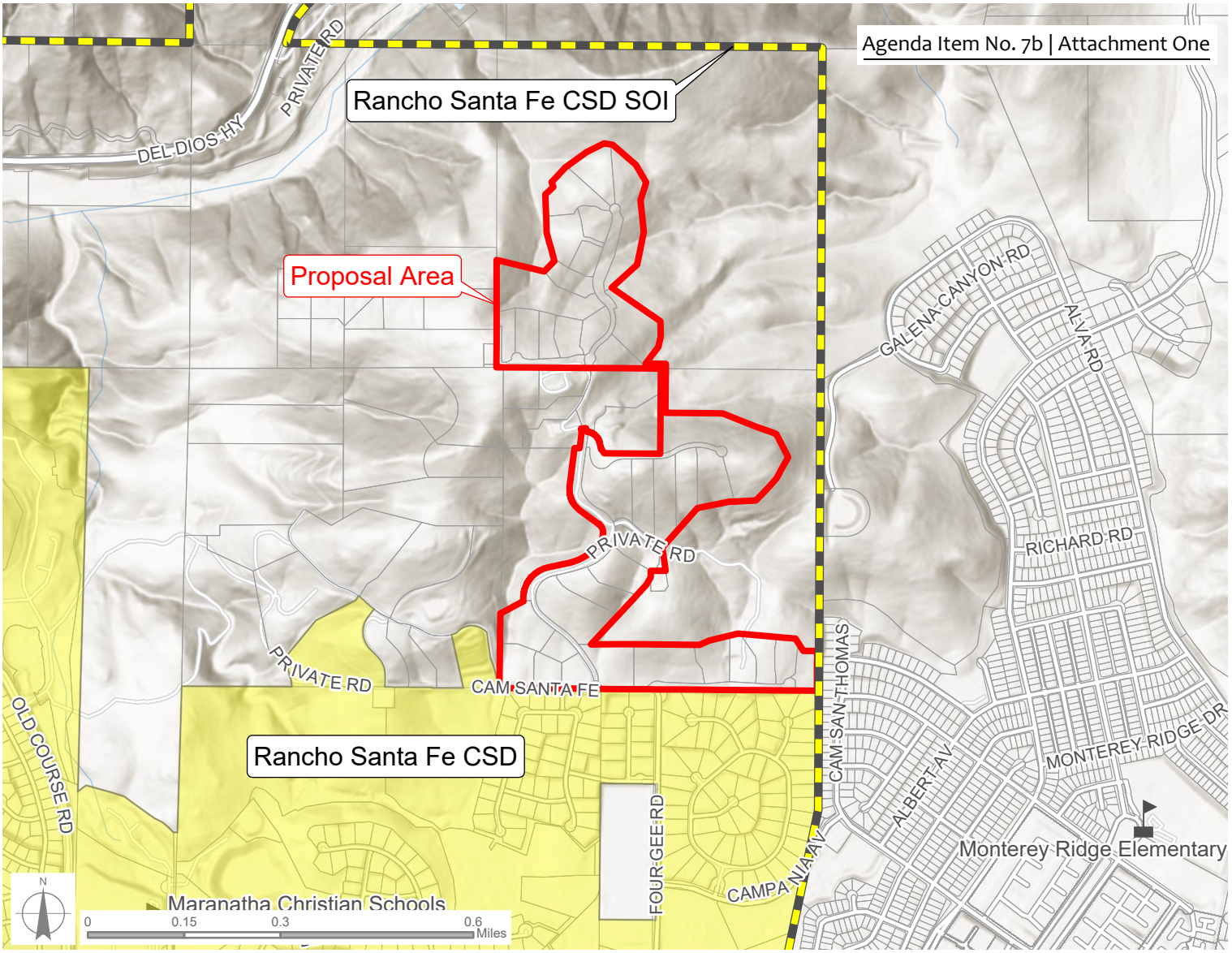
The County of San Diego General Plan includes a hazard mitigation plan addressing risks related to wildfire, flooding, and seismic activity. The affected territory is designated a "Very High" fire hazard severity zone and a "Level 4 Hazard" earthquake hazard zone.[9]

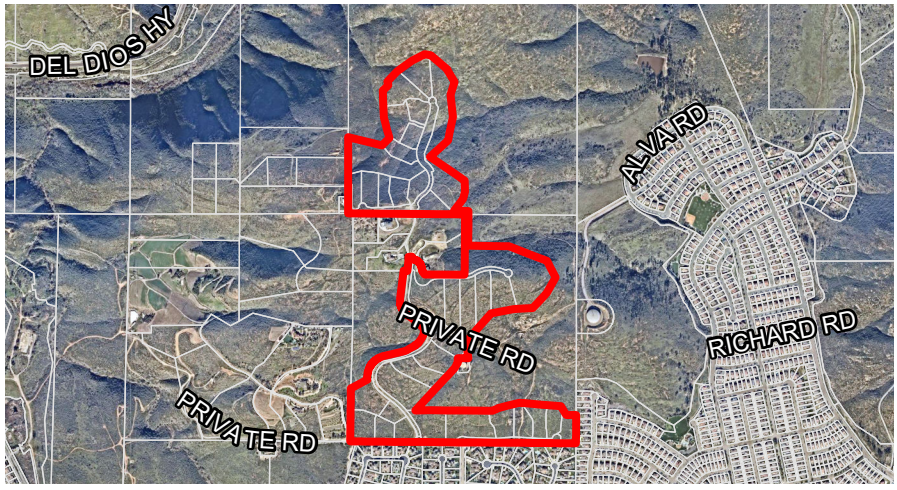
r) Section 56668.3(a)(1) Whether the proposed annexation will be for the interest of the landowners or present or future inhabitants within the district and within the territory proposed to be annex to the district.

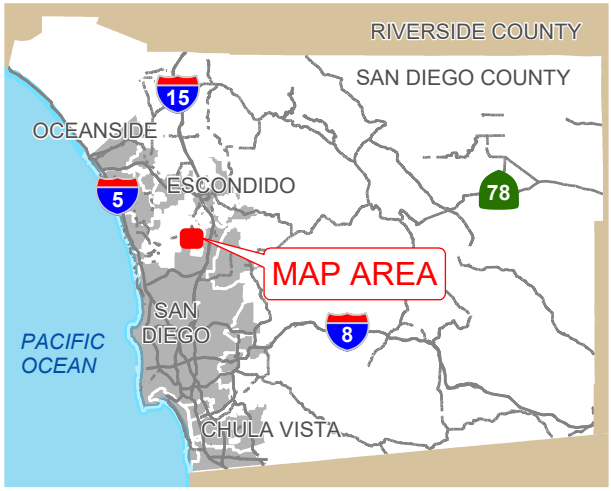
Approval of the change of organization would be in the best interest of current and future landowners/residents of the affected territory by providing reliable wastewater services going forward.

[9] The Modified Mercalli Intensity (MMI) scale measures how much shaking can be expected from future earthquakes. The MMI is based on the amount of shaking that has a 2% chance of being exceeded in the next 50 years. In California, the lowest level of shaking is a 3, which means strong shaking. Level 4 indicates very strong shaking. Source: County of San Diego Know Your Hazards Tool

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CO16-11 "RANCHO HILLS CHANGE OF ORGANIZATION" | RANCHO SANTA FE CSD

- Proposal Area
- Rancho Santa Fe CSD
- Rancho Santa Fe CSD SOI

SOI = Sphere of Influence

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

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RESOLUTION NO. _____

SAN DIEGO COUNTY LOCAL AGENCY FORMATION COMMISSION

MAKING DETERMINATIONS, APPROVING, AND ORDERING A CHANGE OF ORGANIZATION

"RANCHO HILLS CHANGE OF ORGANIZATION"
ANNEXATION TO THE RANCHO SANTA FE COMMUNITY SERVICES DISTRICT
AND RELATED ACTIONS (LAFCO FILE NO: CO16-11)

WHEREAS, on May 7, 2025 interested landowners – Ali Shapouri and Yun Yung – filed a petition to initiate proceedings and an application with the San Diego County Local Agency Formation Commission, hereinafter referred to as "Commission", pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000; and

WHEREAS, the application seeks approval of a change of organization to annex 107.0 acres of unincorporated territory in the County of San Diego to the Rancho Santa Fe Community Services District (CSD);

WHEREAS, the reorganization is proposed to facilitate a 37-unit residential development project known as "Rancho Hills," which comprises approximately 107.0 unincorporated acres and was conditionally approved by the County of San Diego; and

WHEREAS, the affected territory as submitted comprises 44 undeveloped and vacant legal parcels with unassigned situs addresses, collectively identified by the County of San Diego Assessor's Office with their respective APNs as provided in the proposal materials; and

WHEREAS, on December 14, 1982, the County of San Diego and Rancho Santa Fe CSD approved a Master Property Tax Transfer Agreement that will govern the property tax exchange associated with the change of organization of the affected territory to the Rancho Santa Fe CSD; and

WHEREAS, the Commission has reviewed and considered the California Environmental Quality Act (CEQA) documentation prepared for the Rancho Hills project and change of organization by the County of San Diego as the lead agency; and

WHEREAS, the Commission's Executive Officer has reviewed the proposed change of organization and prepared a report with recommendations; and

WHEREAS, the Executive Officer's report and recommendations on the proposal have been presented to the Commission in the manner provided by law; and

WHEREAS, the Commission heard and fully considered all the evidence presented at a noticed public meeting on the proposal on November 3, 2025;

WHEREAS, the Commission considered all the factors required by law under Government Code Section 56668 as well as adopted local policies and procedures.

NOW, THEREFORE, THE COMMISSION DOES HEREBY RESOLVE, DETERMINE, AND ORDER as follows:

1. The public meeting was held on the date set therefore, and due notice of said meeting was given in the manner required by law.

2. At the public meeting, the Commission considered the Executive Officer's report.

3. With respect to considering the effects of the proposed change of organization under the CEQA, the Commission makes the following finding:

    - The County of San Diego serves as lead agency under CEQA for considering the change of organization and the expansion of Rancho Santa Fe CSD's wastewater service area as part of its discretion to approve the underlying development project. An Addendum to a previously certified Environmental Impact Report (EIR) was prepared and considered for this project pursuant to the provisions of CEQA, and mitigation measures and a mitigation reporting or monitoring plan was adopted for this project. In its role as lead agency, on November 1, 2006 the County certified an EIR and adopted a Notice of Determination (NOD) and in doing so made findings that project will not have a significant effect on the environment with approved mitigation measures. The Commission finds the County has prepared sufficient documentation as lead agency in assessing and mitigating impacts, and it would be appropriate for the Commission to adopt parallel findings as responsible agency.

4. The Commission CONDITIONALLY APPROVES the change of organization without modifications subject to conditions as provided subject to recordation of a certificate of completion for the proposal. Approval involves all the following:

    a) Annexation of the affected territory to the Rancho Santa Fe CSD as shown in "Exhibit A-1" and described in "Exhibit A-2".

    b) Approval is specific only to Rancho Santa Fe CSD's activated wastewater function; all other functions – whether active or latent – are expressly omitted from this approval.

5. The Commission CONDITIONS all approvals on the following terms being satisfied by November 3, 2026 unless an extension is requested in writing and approved by the Executive Officer:

    a) Completion of the 30-day reconsideration period provided under Government Code Section 56895.

    b) Submittal to the Commission of final map and geographic description of the affected territory as approved by the Commission conforming to the requirements of the State Board of Equalization – Tax Services Divisions.

c) Submittal to the Commission of the following payments:

- A check made payable to LAFCO in the amount of $50.00 for the County of San Diego-Clerk Recorder to reimburse for filing one CEQA Notice of Exemption consistent with the findings in the resolution.
- A check made payable to the State Board of Equalization for processing fees in the amount of $2,000.00.

d) Written confirmation from Rancho Santa Fe CSD that the landowner has secured a legal easement providing physical access to the wastewater collection main.

6. The Commission assigns the proposal the following short-term designation:

   "Rancho Hills Change of Organization".

7. The affected territory as designated by the Commission is uninhabited as defined in Government Code Section 56046.

8. The Commission waives conducting authority proceedings under Government Code Section 56662.

9. The Rancho Santa Fe CSD is a registered-voter district.

10. Rancho Santa Fe CSD utilizes the County of San Diego assessment roll.

11. The affected territory will be liable for any existing bonds, contracts, and/or obligations of the Rancho Santa Fe CSD as provided under Government Section 57328, and will be subject to any previously authorized taxes, benefit assessments, fees or charges of the Rancho Santa Fe CSD as provided under Government Code Section 57330.

12. The effective date of approval shall be the date of recordation but not before the completion of a 30-day reconsideration period and only after all terms have been completed as attested by the Executive Officer.

13. As allowed under Government Code Section 56107, the Commission authorized the Executive Officer to make non-substantive corrections to the resolution to address any technical defects, errors, irregulates, or omissions.

14. The Executive Officer is hereby authorized and directed to transmit copies of this resolution as provided in Sections 56880-56882 of the Government Code.

15. The Executive Officer is further authorized and directed to prepare, execute, and record a Certificate of Completion, make the required filings with the County Assessor, County

Auditor, and the State Board of Equalization as required by Section 57200, et seq., of the Government Code.

**

PASSED AND ADOPTED by the Commission on November 3, 2025 by the following vote:

AYES:

NOES:

ABSENT:

ABSTAINING:

**

ATTEST:

_____
Keene Simonds
Executive Officer

EXHIBIT A-1
MAP OF AFFECTED TERRITORY

-Placeholder-

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EXHIBIT A-2
GEOGRAPHIC DESCRIPTION OF THE AFFECTED TERRITORY

-Placeholder-

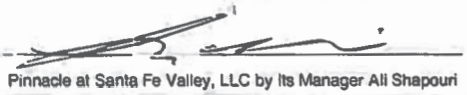
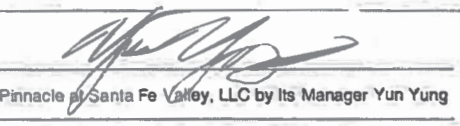
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Part IVb: LANDOWNER PETITION

Petitions must meet minimum signature requirements (see Part V). Signatures must be secured within six months of the date on which the first signature was affixed. Petitions must be submitted to the LAFCO Executive Officer within 60 days after the last signature is affixed (Govt. Code § 56705).

Each of the undersigned states:

- I personally signed this petition.
- I am a landowner of the affected territory.
- I personally affixed hereto the date of my signing this petition and the Assessor's Parcel Number(s), or a description sufficient to identify the location of my land.

Name of Signer	Assessor's Parcel Number(s)	Date Signed	Official Use
Sign  Print Pinnacle at Santa Fe Valley, LLC by its Manager Ali Shapouri	678-061-01,02,03,04,05,06,07,08,09,10,11 &12 678-062-01,02,03,04,05,06,07,08,09 &10 678-022-01,022,03,04,05,06,07,08,09,10,11,12,13,14 & 15	4/23/2025	
Sign  Print Pinnacle at Santa Fe Valley, LLC by its Manager Yun Yung	678-061-01,02,03,04,05,06,07,08,09,10,11 &12 678-062-01,02,03,04,05,06,07,08,09 &10 678-022-01,022,03,04,05,06,07,08,09,10,11,12,13,14 & 15	4/23/2025	
Sign _____ Print _____			
Sign _____ Print _____			
Sign _____ Print _____			
Sign _____ Print _____			

Pinnacle at Santa Fe Valley Community List of Assessor Parcel Numbers

1. 678-061-01
2. 678-061-02
3. 678-061-03
4. 678-061-04
5. 678-061-05
6. 678-061-06
7. 678-061-07
8. 678-061-08
9. 678-061-09
10. 678-061-10
11. 678-061-11
12. 678-061-12
13. 678-022-01
14. 678-062-01
15. 678-062-02
16. 678-062-03
17. 678-062-04
18. 678-062-05
19. 678-062-06
20. 678-062-07
21. 678-062-08
22. 678-062-09
23. 678-062-10
24. 678-022-02
25. 678-022-03
26. 678-022-04
27. 678-022-05
28. 678-022-06
29. 678-022-07
30. 678-022-08
31. 678-022-09
32. 678-022-10
33. 678-022-11
34. 678-022-12
35. 678-022-13
36. 678-022-14
37. 678-022-15
38. 678-022-16 Summit Drive (road lot)
39. 678-022-17 Pinnacle Peak Road (road lot)
40. 678-061-13 Coastal Breeze Trail (road lot)
41. 678-061-14 Camino Santa Fe (road lot)
42. 678-062-13 Serenity Place (road lot)
43. 678-062-11 Pinnacle Peak Road(road lot)
44. 678-062-12 Tank Road (road lot)

County of San Diego, Planning & Development Services

PROJECT FACILITY COMMITMENT - Sewer

ZONING DIVISION

Please type or use pen

Pinnacle at Santa Fe Valley, LLC (619) 813-4000
Owner's Name Phone

P.O. Box 676221
Owner's Mailing Address Street

Rancho Santa Fe California 92067
City State Zip

ORG_____ **S**
ACCT_____
ACT_____
TASK_____
DATE_____ AMT $_____
DISTRICT CASHIER'S USE ONLY

SECTION 1. PROJECT DESCRIPTION — TO BE COMPLETED BY APPLICANT

1. ☒ Major Subdivision (TM) Case No. TM 5081
   ☐ Minor Subdivision (TPM) Case No._____
   ☐ Major Use Permit (MUP) Case No._____
   ☐ Purpose of MUP:_____
   ☐ Certificate of Compliance_____
   ☐ Other_____

2. ☒ Residential . . . . . Total number of dwelling units 37
   ☐ Commercial . . . . Gross floor area_____
   ☐ Industrial . . . . . .Gross floor area_____
   ☐ Other . . . . . Gross floor area_____

3. Total Project acreage _____ Total lots_____ Smallest proposed lot_____

4. Is the project proposing its own wastewater treatment plant? Yes ☐ No ☒
   Is the project proposing the use of reclaimed water? ☐ ☒

Assessor's Parcel Number(s)
(Add extra if necessary)

678-060-41-00	678-020-25-00

Thomas Guide Page: 1169 & 1149 Grid: 1D, 1E, 7D, 7E

Project Address:
18082 Four Gee Road, San Diego CA 92127

Community Planning Area/Subregion:
San Dieguito Community Plan

Applicant's Signature: [signature] Manager Date: 7/8/23

Address: P.O. Box 676221, Rancho Santa Fe, CA 92067 Phone: (619) 813-4000

(On completion of above, present to the sewer district with appropriate fee to establish facility commitment, Section B below.)

SECTION 2: FACILITY COMMITMENT — TO BE COMPLETED BY DISTRICT

Pursuant to the Public Facility Element of the General Plan and County Board of Supervisors Policy I-84, commitment must be for a period of at least years. Commitment must be obtained within the three months prior to the date of final action by the approving authority. ***THIS IS NOT A WASTEWATER DISCHARGE PERMIT,*** *and capacity fees are subject to increase prior to issuance of a discharge permit.*

District name Rancho Santa Fe CSD Service area SFV

☒ Amount of capacity committed for this project: 37 EDUs.
Optional: Number of EDUs_____ x Connection Fees $_____ = Total Capacity Fees: $_____
(These fees are not refundable.)

☐ Facility capacity has been committed pursuant to a binding agreement satisfactory to the district. Expiration date:_____
(Commitment must be for a minimum of two years. If no expiration date, please so specify.)

☐ Facility capacity is committed for this project until_____. (Termination date of this letter must be at least two years from the date of issuance.)

☐ The District Board of Directors has certified that public agency facilities are under construction and permits to construct have been received. Capacity for this project is committed for a period of at least two years from the time that the public agency's facility improvements come on-line. Scheduled (not guaranteed) start-up date:_____ Facility capacity is committed until:_____
(if no expiration date, please so specify)

Paula Melendrez — *Authorized signature*
Paula Melendrez — *Print name*
Asst. Gen. Manager — *Print title*
760-479-4150 — *Phone*

On completion of Section B by the District, applicant is to submit this form to:
Department of Public Works, Final Maps or Grading, 5510 Overland Avenue, Suite 310, San Diego, CA 92123

PDS-400S (Rev. 4/16/2021)

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
ANNEXATION TO THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT
WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

LOTS 1 THROUGH 44 OF COUNTY OF SAN DIEGO TRACT NO. 5081-1, IN THE COUNTY OF SAN DIEGO, STATE OF CALIFORNIA, ACCORDING TO OFFICIAL MAP THEREOF NO. 16587, FILED IN THE OFFICE OF THE COUNTY RECORDER OF SAN DIEGO COUNTY, SEPTEMBER 13, 2023, SAID PROPERTY BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT THE SOUTHEAST CORNER OF LOT 1 OF SAID MAP NO. 16587, SAID CORNER ALSO LYING ON THE WESTERLY BOUNDARY LINE OF THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT BOUNDARY;

1. THENCE ALONG THE SOUTHERLY LINE OF THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT BOUNDARY AND THE SOUTHERLY LINE OF LOTS 38 AND 39 OF SAID MAP NO. 16587, NORTH 89°31'35" WEST, 2609.68 FEET TO THE SOUTHWEST CORNER OF SAID LOT 39;

2. THENCE LEAVING SAID RANCHO SANTA FE COMMUNITY SERVICE DISTRICT BOUNDARY ALONG THE WESTERLY LINE OF SAID LOT 39, LOT 10, AND LOT 12 OF SAID MAP NO. 16587, NORTH 00°46'14" EAST, 613.86 FEET TO THE WESTERLY CORNER OF SAID LOT 12;

3. THENCE ALONG THE NORTHWESTERLY LINE OF SAID LOT 12, NORTH 62°15'23" EAST, 213.15 FEET TO THE NORTHWESTERLY CORNER OF SAID LOT 12, ALSO BEING THE BEGINNING OF A NON-TANGENT 260.00 FOOT RADIUS CURVE, CONCAVE SOUTHEASTERLY, AND A RADIAL BEARING SOUTH 84°38'46" WEST FROM SAID RADIUS POINT;

4. THENCE NORTHEASTERLY ALONG THE WESTERLY LINE OF LOT 40 OF SAID MAP NO. 16587 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 82°55'53", A DISTANCE OF 376.33 FEET;

5. THENCE CONTINUING ALONG THE WESTERLY LINE OF SAID LOT 40, NORTH 77°34'39" EAST, A DISTANCE OF 187.72 FEET TO THE BEGINNING OF A TANGENT 340.00 FOOT RADIUS CURVE, CONCAVE NORTHWESTERLY;

6. THENCE NORTHEASTERLY ALONG THE WESTERLY LINE OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 17°01'30", A DISTANCE OF 101.03 FEET;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
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WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

7. THENCE CONTINUING ALONG THE WESTERLY LINE OF SAID LOT 40, NORTH 60°33'09" EAST, 66.49 FEET TO THE BEGINNING OF A TANGENT 240.00 FOOT RADIUS CURVE, CONCAVE NORTHWESTERLY;

8. THENCE NORTHEASTERLY ALONG THE WESTERLY LINE OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 47°25'57", A DISTANCE OF 198.68 FEET TO THE BEGINNING OF A COMPOUND 90.00 FOOT RADIUS CURVE, CONCAVE WESTERLY;

9. THENCE NORTHWESTERLY ALONG THE WESTERLY LINE OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 68°49'20", A DISTANCE OF 108.11 FEET;

10. THENCE ALONG THE WESTERLY LINE OF SAID LOT 40, NORTH 53°55'09" WEST, A DISTANCE OF 187.82 FEET TO THE BEGINNING OF A TANGENT 210.00 FOOT RADIUS CURVE, CONCAVE NORTHEASTERLY;

11. THENCE NORTHWESTERLY ALONG THE WESTERLY LINE OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 61°02'18", A DISTANCE OF 223.72 FEET;

12. THENCE ALONG THE WESTERLY LINE OF SAID LOT 40, NORTH 07°07'09" EAST, A DISTANCE OF 318.36 FEET TO THE WESTERLY CORNER OF SAID LOT 40;

13. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 40, SOUTH 89°31'21" EAST, 43.12 FEET TO A CORNER OF SAID LOT 40;

14. THENCE ALONG THE WESTERLY LINE OF SAID LOT 40, NORTH 07°08'34" EAST, 114.31 FEET TO THE BEGINNING OF A TANGENT 130.00 FOOT RADIUS CURVE, CONCAVE WESTERLY;

15. THENCE NORTHERLY ALONG THE WESTERLY LINE OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 21°05'17", A DISTANCE OF 47.85 FEET TO THE NORTHWESTERLY CORNER OF SAID LOT 40;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
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WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

16. THENCE ALONG THE NORTHERLY BOUNDARY OF SAID LOT 40, NORTH 84°57'09" EAST, 40.37 FEET TO THE NORTHERLY CORNER OF SAID LOT 40 ALSO BEING THE BEGINNING OF A NON-TANGENT 170.00 FOOT RADIUS CURVE, CONCAVE WESTERLY, AND A RADIAL BEARING NORTH 78°09'35" EAST FROM SAID RADIUS POINT;

17. THENCE SOUTHEASTERLY ALONG THE EASTERLY BOUNDARY OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 6°49'35", A DISTANCE OF 20.25 FEET TO THE BEGINNING OF A REVERSE 10.00 FOOT RADIUS CURVE, CONCAVE NORTHEASTERLY;

18. THENCE SOUTHEASTERLY ALONG THR NORTHEASTERLY BOUNDARY OF SAID LOT 40 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 77°33'38", A DISTANCE OF 13.54 FEET TO THE BEGINNING OF A REVERSE 120.00 FOOT RADIUS CURVE, CONCAVE SOUTHWESTERLY;

19. THENCE SOUTHEASTERLY ALONG THE NORTHEASTERLY LINE OF LOT 40 AND LOT 42 OF SAID MAP NO. 16587 ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 72°14'36", A DISTANCE OF 151.31 FEET;

20. THENCE ALONG THE EASTERLY LINE OF SAID LOT 42, SOUTH 10°19'52" EAST, 22.11 FEET TO THE BEGINNING OF A TANGENT 80.00 FOOT CURVE, CONCAVE NORTHEASTERLY;

21. THENCE SOUTHEASTERLY ALONG THE EASTERLY LINE OF SAID LOT 42 AND ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 25°12'31", A DISTANCE OF 35.20 FEET;

22. THENCE CONTINUING ALONG THE EASTERLY LINE OF SAID LOT 42, SOUTH 35°32'23" EAST, 31.38 FEET;

23. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 42, SOUTH 89°29'43" EAST, 459.86 FEET TO THE SOUTHWESTERLY CORNER OF LOT 23 OF SAID MAP NO. 16587;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
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WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

24. THENCE ALONG THE WESTERLY LINE OF SAID LOT 23, NORTH 00°29'28" EAST, 698.89 FEET TO THE NORTHWESTERLY CORNER OF SAID LOT 23;

25. THENCE ALONG THE SOUTHERLY LINE OF LOT 30, 24, AND 43 OF SAID MAP NO. 16587, NORTH 89°31'00" WEST, 1291.99 FEET TO A POINT ON THE SOUTHERLY LINE OF SAID LOT 43;

26. THENCE CONTINUING ALONG THE SOUTHERLY LINE OF SAID LOT 43, NORTH 89°50'01" WEST, 59.26 FEET TO THE SOUTHWESTERLY CORNER OF SAID LOT 43;

27. THENCE ALONG THE WESTERLY LINE OF SAID LOT 43, 29, AND 37, NORTH 00°06'02" EAST, 881.19 FEET TO THE NORTHWESTERLY CORNER OF SAID LOT 37;

28. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 37, SOUTH 76°28'37" EAST, 402.66 FEET TO THE NORTHERLY CORNER OF SAID LOT 37;

29. THENCE ALONG THE NORTHWESTERLY LINE OF LOT 13 OF SAID MAP NO. 16587, NORTH 44°26'23" EAST, 119.57 FEET TO THE NORTHERLY CORNER OF SAID LOT 13;

30. THENCE ALONG THE WESTERLY LINE OF LOT 35 OF MAP NO. 16587, NORTH 15°33'42" WEST, 241.87 FEET TO THE WESTERLY CORNER OF SAID LOT 35;

31. THENCE ALONG THE WESTERLY LINE OF SAID LOT 35 AND LOT 33 OF SAID MAP NO. 16587, NORTH 01°47'07" WEST, 315.87 FEET TO THE WESTERLY CORNER OF SAID LOT 33;

32. THENCE ALONG THE NORTHWESTERLY LINE OF SAID LOT 33, NORTH 47°14'28" EAST, 88.48 FEET TO A CORNER OF SAID LOT 33;

33. THENCE ALONG THE WESTERLY LINE OF SAID LOT 33, NORTH 18°49'42" WEST, 43.40 FEET TO A CORNER OF SAID LOT 33;

34. THENCE ALONG THE NORTHWESTERLY LINE OF SAID LOT 33, NORTH 43°15'26" EAST, 162.30 FEET TO AN ANGLE POINT OF SAID LOT 33;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
ANNEXATION TO THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT
WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

35. THENCE ALONG THE NORTHWESTERLY LINE OF SAID LOT 33 AND LOT 32 OF MAP NO. 16587, NORTH 54°02'14" EAST, 215.21 FEET TO AN ANGLE POINT OF SAID LOT 32;

36. THENCE CONTINUING ALONG THE NORTHWESTERLY LINE OF LOT 32, NORTH 63°22'14" EAST, 164.33 FEET TO THE NORTHERLY CORNER OF SAID LOT 32;

37. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 32 AND LOT 31 OF SAID MAP NO. 16587, SOUTH 79°58'11" EAST, 71.27 FEET TO AN ANGLE POINT OF SAID LOT 31;

38. THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOT 31, SOUTH 49°02'44" EAST, 251.12 FEET TO AN ANGLE POINT OF SAID LOT 31;

39. THENCE ALONG THE EASTERLY LINE OF SAID LOT 31, SOUTH 30°16'09" EAST. 168.01 FEET TO THE EASTERLY CORNER OF SAID LOT 31;

40. THENCE CONTINUING ALONG THE EASTERLY LINE OF SAID LOT 31, SOUTH 17°18'30" WEST, 153.99 FEET TO AN ANGLE POINT OF SAID LOT 31;

41. THENCE CONTINUING ALONG THE EASTERLY LINE OF SAID LOT 31, SOUTH 05°53'11" EAST, 261.21 FEET TO AN ANGLE POINT OF SAID LOT 31;

42. THENCE CONTINUING ALONG THE EASTERLY LINE OF SAID LOT 31, SOUTH 11°38'49" WEST, 274.26 FEET TO AN ANGLE POINT OF SAID LOT 31;

43. THENCE ALONG THE SOUTHEASTERLY LINE OF SAID LOT 31, SOUTH 47°42'01" WEST, 281.18 FEET TO THE SOUTHEASTERLY CORNER OF SAID LOT 31;

44. THENCE ALONG THE NORTHEASTERLY LINE OF LOT 30 OF SAID MAP NO. 16587, SOUTH 55°31'17" EAST, 485.77 FEET A CORNER OF SAID LOT 30;

45. THENCE ALONG THE EASTERLY LINE OF SAID LOT 30, SOUTH 00°29'51" EAST, 127.91 FEET TO AN ANGLE POINT OF SAID LOT 30;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
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WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

46. THENCE ALONG THE SOUTHEASTERLY LINE OF SAID LOT 30, SOUTH 13°07'52" WEST, 86.96 FEET TO AN ANGLE POINT OF SAID LOT 30;

47. THENCE CONTINUING ALONG THE SOUTHEASTERLY LINE OF SAID LOT 30, SOUTH 37°35'43" WEST, 171.79 FEET TO A CORNER OF SAID LOT 30;

48. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 30, SOUTH 89°31'00" EAST, 167.10 FEET TO THE NORTHEASTERLY CORNER OF SAID LOT 30;

49. THENCE ALONG THE EASTERLY LINE OF SAID LOT 30, SOUTH 00°29'28" WEST, 40.00 FEET TO THE SOUTHEASTERLY CORNER OF SAID LOT 30;

50. THENCE ALONG THE EASTERLY LINE OF SAID LOT 23, SOUTH 00°29'28" WEST, 362.85 FEET TO A CORNER OF SAID LOT 23;

51. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 23, SOUTH 89°21'46" EAST, 471.51 FEET TO AN ANGLE POINT OF SAID LOT 23;

52. THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOT 23, SOUTH 68°21'38" EAST, 293.54 FEET TO AN ANGLE POINT OF SAID LOT 23;

53. THENCE CONTINUING ALONG THE NORTHEASTERLY LINE OF SAID LOT 23. SOUTH 70°12'15" EAST, 176.84 FEET TO AN ANGLE POINT OF SAID LOT 23;

54. THENCE ALONG THE EASTERLY LINE OF SAID LOT 23, SOUTH 27°00'24" EAST, 215.41 FEET TO THE EASTERLY CORNER OF SAID LOT 23;

55. THENCE ALONG THE SOUTHEASTERLY LINE OF SAID LOT 23, SOUTH 28°56'52" WEST, 205.10 FEET TO AN ANGLE POINT OF SAID LOT 23;

56. THENCE CONTINUING ALONG THE SOUTHEASTERLY LINE OF SAID LOT 23, SOUTH 43°10'50" WEST, 241.19 FEET TO THE SOUTHEASTERLY CORNER OF SAID LOT 23;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
ANNEXATION TO THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT
WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

57. THENCE ALONG THE SOUTHERLY LINE OF SAID LOT 23 AND LOT 22 OF SAID MAP NO. 16587, SOUTH 87°16'54" WEST, 221.29 FEET TO AN ANGLE POINT OF SAID LOT 22;

58. THENCE CONTINUING ALONG THE SOUTHERLY LINE OF SAID LOT 22, SOUTH 78°53'12" WEST, 264.61 FEET TO THE SOUTHWESTERLY CORNER OF SAID LOT 22;

59. THENCE ALONG THE SOUTHEASTERLY LINE OF LOT 21 AND LOT 20 OF SAID MAP NO. 16587, SOUTH 41°34'58" WEST, 435.95 FEET TO THE SOUTHERLY CORNER OF SAID LOT 20;

60. THENCE ALONG THE EASTERLY LINE OF LOT 41 OF SAID MAP NO. 16587, SOUTH 08°30'27" EAST, 192.09 FEET TO THE SOUTHEASTERLY CORNER OF SAID LOT 41;

61. THENCE ALONG THE SOUTHERLY LINE OF SAID LOT 41 AND LOT 17 OF SAID MAP NO. 16587, NORTH 89°59'33" WEST, 122.97 FEET TO THE SOUTHWESTERLY CORNER OF SAID LOT 17;

62. THENCE ALONG THE EASTERLY LINE OF LOT 16 OF SAID MAP NO. 16587, SOUTH 00°00'27" WEST, 53.68 FEET TO AN ANGLE POINT OF SAID LOT 16;

63. THENCE ALONG THE SOUTHEASTERLY LINE OF SAID LOT 16, SOUTH 31°12'14" WEST, 69.74 FEET TO AN ANGLE POINT OF SAID LOT 16;

64. THENCE CONTINUING ALONG THE SOUTHEASTERLY LINE OF SAID LOT 16 AND LOT 15 OF SAID MAP NO. 16587, SOUTH 42°03'26" WEST, 158.19 FEET TO AN ANGLE POINT OF SAID LOT 15;

65. THENCE CONTINUING ALONG THE SOUTHEASTERLY LINE OF SAID LOT 15 AND LOT 14 OF SAID MAP NO. 16587, SOUTH 42°58'33" WEST, 511.04 FEET TO THE SOUTHEASTERLY CORNER OF SAID LOT 14;

66. THENCE ALONG THE NORTHERLY LINE OF LOT 7 OF SAID MAP NO. 16587, NORTH 89°18'09" EAST, 178.14 FEET TO AN ANGLE POINT OF SAID LOT 7;

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
ANNEXATION TO THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT
WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

67. THENCE CONTINUING ALONG THE NORTHERLY LINE OF SAID LOT 7, SOUTH 89°32'29" EAST, 173.00 FEET TO THE NORTHEASTERLY CORNER OF SAID LOT 7;

68. THENCE ALONG THE NORTHERLY LINE OF LOT 6 AND LOT 5 OF SAID MAP NO. 16587, SOUTH 89°31'47" EAST, 529.92 FEET TO AN ANGLE POINT OF SAID LOT 5;

69. THENCE CONTINUING ALONG THE NORTHERLY LINE OF SAID LOT 5, NORTH 89°59'33" EAST, 13.21 FEET TO AN ANGLE POINT OF SAID LOT 5;

70. THENCE CONTINUING ALONG THE NORTHERLY LINE OF SAID LOT 5, NORTH 64°55'14" EAST, 78.56 FEET TO AN ANGLE POINT OF SAID LOT 5;

71. THENCE CONTINUING ALONG THE NORTHERLY LINE OF SAID LOT 5, NORTH 75°58'18" EAST, 112.72 FEET TO AN ANGLE POINT OF SAID LOT 5;

72. THENCE CONTINUING ALONG THE NORTHERLY LINE OF SAID LOT 5 AND LOT 4 OF SAID MAP NO. 16587, NORTH 76°40'47" EAST, 135.79 FEET TO THE NORTHERLY CORNER OF SAID LOT 4;

73. THENCE CONTINUING ALONG THE NORTHERLY LINE OF SAID LOT 4, LOT 3, AND LOT 2 OF SAID MAP NO. 16587, SOUTH 85°03'02" EAST, 475.83 FEET TO THE NORTHEASTERLY CORNER OF SAID LOT 2;

74. THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOT 2 AND LOT 1 OF SAID MAP NO. 16587, SOUTH 32°17'08" EAST, 118.79 FEET TO AN ANGLE POINT OF SAID LOT 1;

75. THENCE ALONG THE NORTHERLY LINE OF SAID LOT 1, NORTH 89°53'28" EAST, 112.99 FEET TO THE NORTHEASTERLY CORNER OF SAID LOT 1, BEING A POINT ON SAID WESTERLY BOUNDARY LINE OF RANCHO SANTA FE COMMUNITY SERVICE DISTRICT BOUNDARY;

76. THENCE ALONG THE EASTERLY LINE OF SAID LOT 1 AND SAID WESTERLY BOUNDARY LINE OF RANCHO SANTA FE COMMUNITY SERVICE DISTRICT

EXHIBIT "A"

GEOGRAPHIC DESCRIPTION
RANCHO HILLS REORGANIZATION
ANNEXATION TO THE RANCHO SANTA FE COMMUNITY SERVICE DISTRICT
WITH CONCURRENT DETACHMENT FROM THE COUNTY SERVICE AREA NO. XXX
LAFCO REFERENCE NO. XXXX-XX

BOUNDARY, SOUTH 00°12'54" WEST, 327.34 FEET TO THE **POINT OF BEGINNING.**

CONTAINS 106.975 ACRE MORE OR LESS.

FOR ASSESSMENT PURPOSES ONLY. THIS LAND DESCRIPTION IS NOT A LEGAL PROPERTY DESCRIPTION AS DEFINED IN THE SUBDIVISION MAP ACT AND MAY NOT BE USED AS THE BASIS FOR ANY OFFER FOR SALE OF THE LAND DESCRIBED.

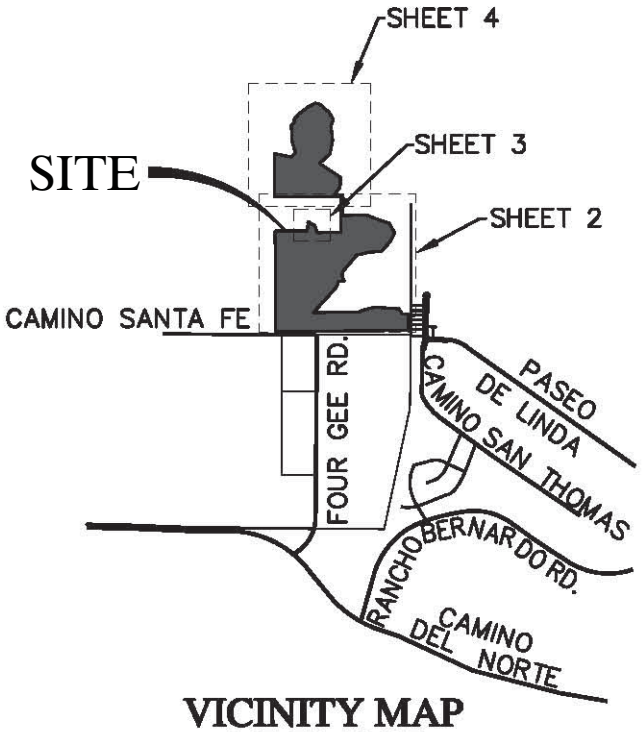


SEAN C. ENGLERT, L.S. 7959 DATE 10/06/2025
COASTAL LAND SOLUTIONS, INC.

EXHIBIT "B"

PLAT FOR RANCHO HILLS ANNEXATION

DISCLAIMER:
"FOR ASSESSMENT PURPOSES ONLY. THIS LAND DESCRIPTION IS NOT A LEGAL PROPERTY DESCRIPTION AS DEFINED IN THE SUBDIVISION MAP ACT AND MAY NOT BE USED AS THE BASIS FOR AN OFFER FOR SALE OF THE LAND DESCRIBED."



VICINITY MAP
NOT TO SCALE

LEGEND

EXISTING RANCHO SANTA FE COMMUNITY SERVICE DISTRICT BOUNDARY

PROPOSED RANCHO SANTA FE COMMUNITY SERVICE DISTRICT BOUNDARY

PREPARED FOR: PINNACLE AT SANTA FE VALLEY
ADDRESS: RANCHO SANTA FE, CA 92067

CLS
CLS#1720LAFCO

COASTAL LAND SOLUTIONS, INC.
191 CALLE MAGDALENA, SUITE 270
ENCINITAS, CA 92024
PH (760) 230-6025

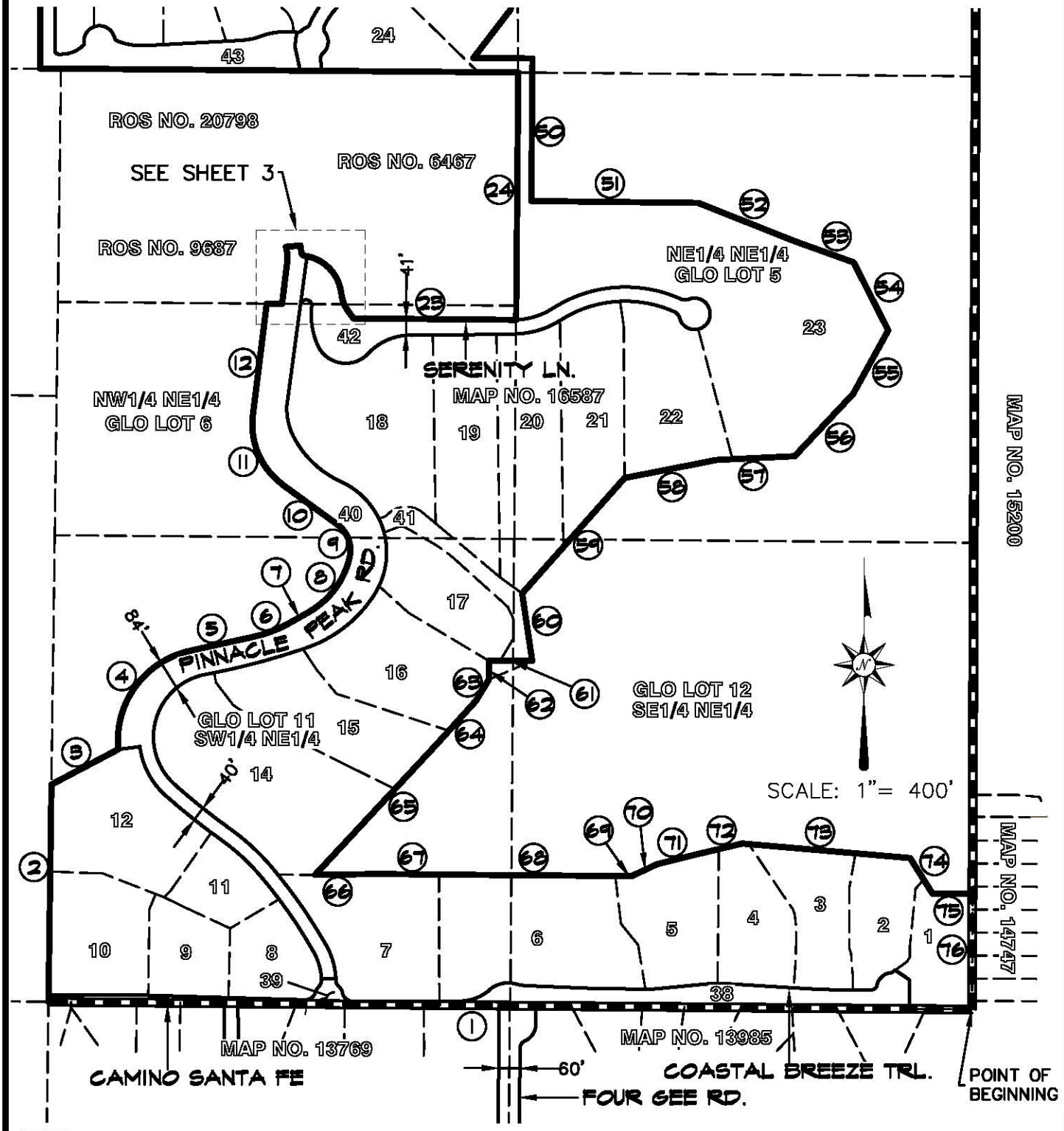
Sean C Englert

SEAN C. ENGLERT, L.S. 7959 DATE

LICENSED LAND SURVEYOR
SEAN CHARLES ENGLERT
L.S. 7959
STATE OF CALIFORNIA

EXHIBIT "B"

PLAT FOR RANCHO HILLS ANNEXATION



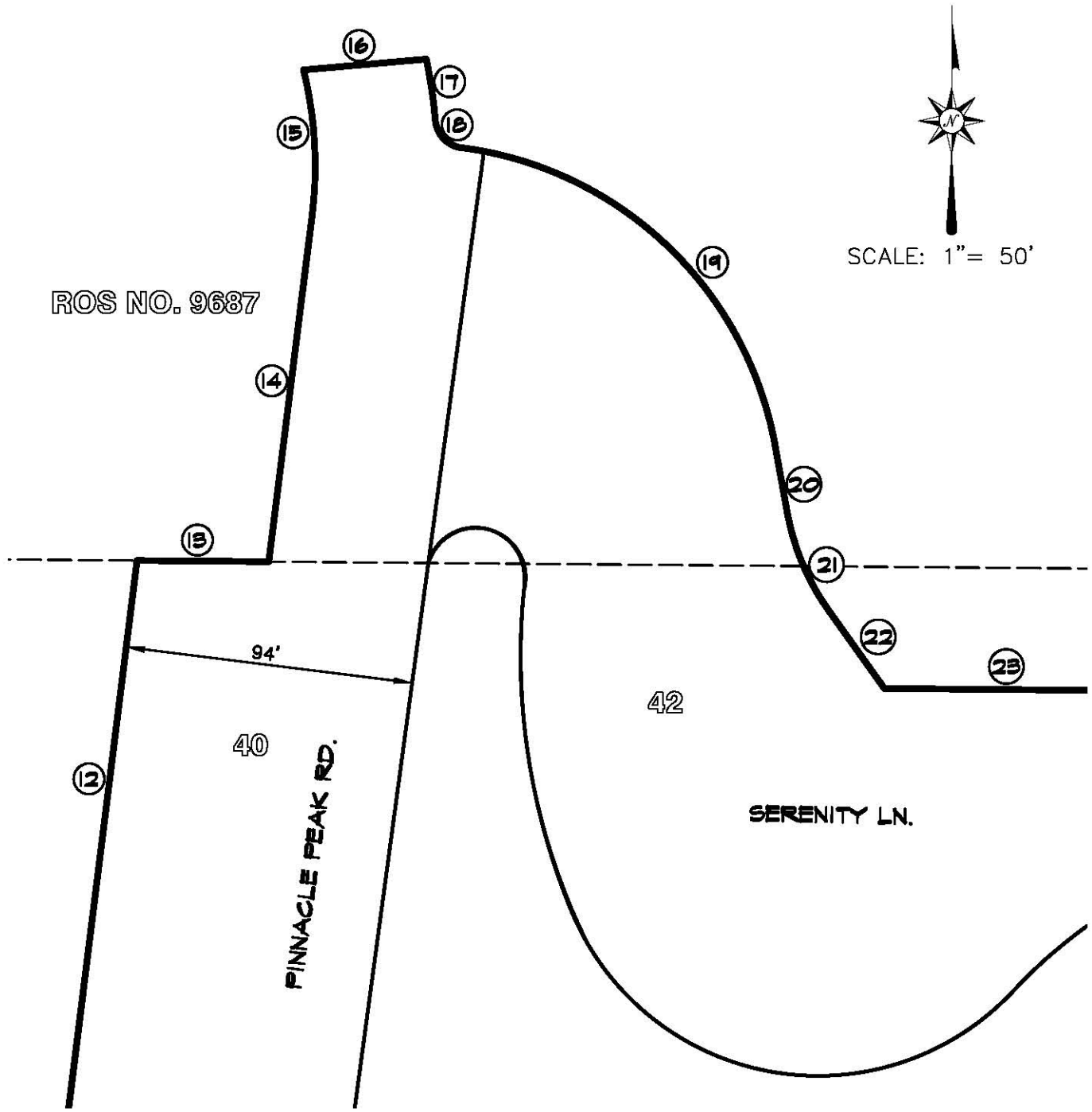
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EXHIBIT "B"

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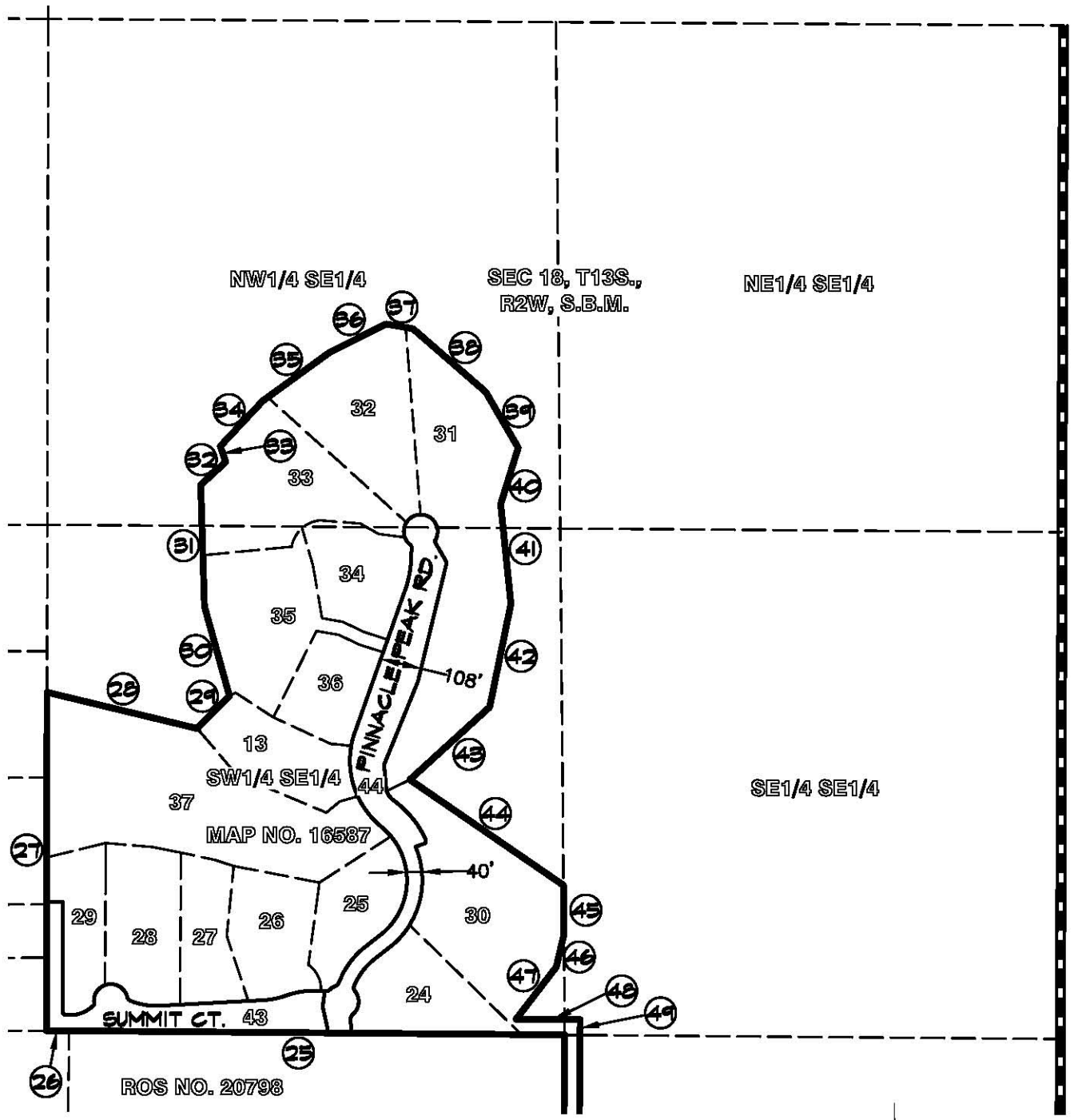


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EXHIBIT "B"

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SCALE: 1"= 400'

EXHIBIT "B"

SHEET 5 OF 5

PLAT FOR RANCHO HILLS ANNEXATION

DIMENSION TABLE

1. N89°31'35"W 2609.68'
2. N00°46'14"E 613.86'
3. N62°15'23"E 213.15'
4. L=376.33' Δ=82°55'53" R=260.00' RADIAL=S84°38'46"W
5. N77°34'39"E 187.72'
6. L=101.03' Δ=17°01'30" R=340.00'
7. N60°33'09"E 66.49'
8. L=198.68' Δ=47°25'57" R=240.00'
9. L=108.11' Δ=68°49'20" R=90.00'
10. N53°55'09"W 187.82'
11. L=223.72' Δ=61°02'18" R=210.00'
12. N07°07'09"E 318.36'
13. S89°31'21"E 43.12'
14. N07°08'34"E 114.31'
15. L=47.85' Δ=21°05'17" R=130.00'
16. N84°57'09"E 40.37'
17. L=20.25' Δ=6°49'35" R=170.00' RADIAL=N78°09'35"E
18. L=13.54' Δ=77°33'38" R=10.00' RADIAL=S84°59'10"W
19. L=151.31' Δ=72°14'36" R=120.00' RADIAL=N07°25'32"E
20. S10°19'52"E 22.11'
21. L=35.20' Δ=25°12'31" R=80.00'
22. S35°32'23"E 31.38'
23. S89°29'43"E 459.86'
24. N00°29'28"E 698.89'
25. N89°31'00"W 1291.99'
26. N89°50'01"W 59.26'
27. N00°06'02"E 881.19'
28. S76°28'37"E 402.66'
29. N44°26'23"E 119.57'
30. N15°33'42"W 241.87'
31. N01°47'07"W 315.87'
32. N47°14'28"E 88.48'
33. N18°49'42"W 43.40'
34. N43°15'26"E 162.30'
35. N54°02'14"E 215.21'
36. N63°22'14"E 164.33'
37. S79°58'11"E 71.27'
38. S49°02'44"E 251.12'
39. S30°16'09"E 168.01'
40. S17°18'30"W 153.99'
41. S05°53'11"E 261.21'
42. S11°38'49"W 274.26'
43. S47°42'01"W 281.18'
44. S55°31'17"E 485.77'
45. S00°29'51"E 127.91'
46. S13°07'52"W 86.96'
47. S37°35'43"W 171.79'
48. S89°31'00"E 167.10'
49. S00°29'28"W 40.00'
50. S00°29'28"W 362.85'
51. S89°21'46"E 471.51'
52. S68°21'38"E 293.54'
53. S70°12'15"E 176.84'
54. S27°00'24"E 215.41'
55. S28°56'52"W 205.10'
56. S43°10'50"W 241.19'
57. S87°16'54"W 221.29'
58. S78°53'12"W 264.61'
59. S41°34'58"W 435.95'
60. S08°30'27"E 192.09'
61. N89°59'33"W 122.97'
62. S00°00'27"W 53.68'
63. S31°12'14"W 69.74'
64. S42°03'26"W 158.19'
65. S42°58'33"W 511.04'
66. N89°18'09"E 178.14'
67. S89°32'29"E 173.00'
68. S89°31'47"E 529.92'
69. N89°59'33"E 13.21'
70. N64°55'14"E 78.56'
71. N75°58'18"E 112.72'
72. N76°40'47"E 135.79'
73. S85°03'02"E 475.83'
74. S32°17'08"E 118.79'
75. N89°53'28"E 112.99'
76. S00°12'54"W 327.34'

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