

8a | Commission
Discussion

January 11, 2023

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STAFF**Carolyn Emery**

Executive Officer

Scott Smith

General Counsel

TO: Local Agency Formation Commission
of Orange County**FROM:** Executive Officer**SUBJECT:** 2022-2025 Work Plan Mid-Year Update

BACKGROUND

On August 10, 2022, the Commission approved the 2022-2025 OC LAFCO Work Strategic Plan. The Work Plan identifies key objectives for the implementation of the agency's goals outlined in the three-year Strategic Plan. At mid-point of each fiscal year, staff provides a report to the Commission on the status of the objectives, as well as applications filed with the agency. This report provides an update on the activities of the work plan through the end of 2022.

DISCUSSION

Project Applications

In accordance with the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 ("CKH Act"), OC LAFCO is required to efficiently process applications for changes of organization or reorganization. Because of statutory timelines, filed applications take precedence over other agency activities and projects. During the current fiscal year, staffing resources have been attributed to five filed applications that include a municipal service and sphere of influence review and proposed changes of organization. To date, two of those applications are missing one or more requirements as established by the CKH Act and OC LAFCO policy, two others have been completed, and the process for the remaining one is underway. The table shown on the next page provides additional details on those applications.

PROJECT APPLICATIONS		
Project	Status/Description	Comments
Aera Property Annexation to the City of Brea	Status: Incomplete Proposed city annexation.	Application requirements are pending.
Capistrano Bay Community Services District Activation of Latent Powers	Status: Incomplete Proposed activation of a Latent Power for flood control protection services.	Plan for Service and application requirements are pending.
Orange County Sanitation District Annexations	Status: Complete Proposed annexation of properties located in the Cities of Anaheim, Villa Park and Yorba Linda.	Approved by the Commission on August 10, 2022.
Orange County Water District Municipal Service and Sphere of Influence Review	Status: Underway Conducting of Municipal Service and Sphere of Influence Reviews	Application filed by OCWD to include preparation of comprehensive MSR and SOI reviews and assessment of potential consolidation of OCWD and MWDOC.
Santa Ana River Reorganization – Areas 1, 1A, 2, and 3	Status: Complete Proposed reorganization of recreational and open space areas located along the Santa Ana River involving boundaries of the cities of Anaheim and Orange.	Approved by the Commission on October 10, 2022.

In addition to the filed applications, during the first half of fiscal year 2022-2023, staff participated in discussions with the cities of Fountain Valley, Yorba Linda, and Westminster regarding the potential annexation of unincorporated areas within their respective spheres. Should the discussions progress to the filing of applications, the efforts and status will be added to the table above, and the Commission will be updated.

2022-2025 Strategic Plan Goals

The section of this report provides summaries of the progress of the Commission's multi-year work plan that has occurred since its approval in August 2022. The approved plan may also be referenced through **Attachment 1 (pages 4-7)** to this report.

Staff Development, Retention and Recruitment

During the current year strategic planning session, the Commission identified succession planning as key priority and established key objectives to support the development and retention of current OC LAFCO staff and effective recruitment of new employees when vacancies occur. Below are the accomplishments involving the objectives of this goal. Additional details for this area may also be found in the attached work plan.

- ✓ Completed an assessment of staff resources in line with current and anticipated projects and activities and conducted recruitment process for a Policy Analyst vacancy. The new hire will begin in January 2023.
- ✓ Cross-training of staff in budgeting and auditing areas is significantly underway.

Improve Municipal Service Review (MSR) Process for Future MSRs

At last year's strategic planning session, the Commission identified improving the process for the preparation of future MSRs as a key goal. Below are highlights of the related activities that have occurred to date for this area.

- ✓ **MSR Schedule for Future MSRs**
Since enactment of the MSR law in 2000, OC LAFCO has conducted MSRs regionally and in five-year cycles. To improve the process, the MSR schedule has been updated to reflect when the next MSR will occur for each agency/region. The schedule identifies the regions established by the Commission, the timeline for fourth cycle of MSRs, and the date of the agency's next MSR. The latter will be added to the schedule upon the completion of the agency/region's fourth cycle MSR. The MSR schedule is attached for reference (**Attachment 2**) and is available to the agencies and other interested parties on the OC LAFCO website.

✓ **MSR Questionnaires**

The collection of data from the agencies is a critical component of the MSR process. For that purpose, a questionnaire at the beginning of the process is distributed to each agency. Additionally, a survey was recently developed to receive feedback from the agencies on their experience during the process. Both instruments complete the objectives of the work plan and will be used to maintain the effective and efficient components of the process and enhance areas where applicable.

Promote Legislative Engagement

Commonly, the introduction of legislation of LAFCO interest occurs during each legislative session. Because of that, it is important for OC LAFCO to stay engaged on the legislative front and for staff to keep the Commission apprised of proposed legislation impacting the agency, and as appropriate, the County, cities and districts. To achieve this, over the past six months, staff has continued participation on the CALAFCO legislative and advisory committees. Additionally, quarterly reports have been provided to the Commission outlining the activities of the legislature and details on proposed bills. During the latter part of the current fiscal cycle, staff will continue to monitor legislation as it surfaces and work with the Chair to establish a legislative ad-hoc committee to develop and enhance OC LAFCO principles and guidelines as indicated in the work plan.

Optimize External Communication

Over the past six months, the following key tasks of the strategic plan were completed to support the agency's communication with local agencies and the public:

- Video FAQs capturing background on OC LAFCO's legislative and local missions, key projects and resources published on agency website.
- Second Edition of The Pulse published and distributed to local agencies and other interested parties.
- Preparation of OC LAFCO Media Kit to disseminate to OC legislators and other interested parties.

The effort to optimize the Commission's communications resources will be continued during the latter part of the fiscal cycle through meetings with legislators and the development of educational platforms to inform stakeholders of OC LAFCO's role, projects and key resources.

SUMMARY

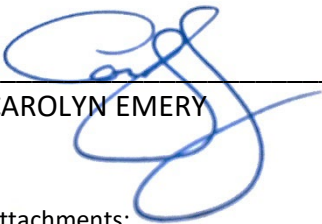
During the second half of the current fiscal cycle, staff will continue to focus on the objectives of the Commission's multi-year strategic plan. It is expected that resources will largely be attributed to the processing of filed applications, continued preparation of the fourth cycle of MSRs and facilitating discussions on island annexations. The next update on the agency's work plan will be given during the year end fiscal report.

RECOMMENDED ACTION

Staff recommends the Commission:

1. Receive and file the FY 2022-2025 Work Plan Mid-Year Update.

Respectfully submitted,



CAROLYN EMERY

Attachments:

1. 2022-2025 Strategic Plan and Work Plan
2. OC LAFCO MSR Schedule (Fourth Cycle)



Three-Year **STRATEGIC PLAN**

2022-2025



IN CONSULTATION WITH
KELLY ASSOCIATES MANAGEMENT GROUP



OC LAFCO 2022-2025 Strategic Plan

August 10, 2022

The Commission

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Derek J. McGregor, Immediate Past Chair

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Wendy Bucknum, City Member

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Commission Staff

Carolyn Emery, Executive Officer

Consulting Staff

Kelly Associates Management Group LLC

William R. Kelly, President/CEO

Introduction

The Orange County Local Agency Formation Commission (OCLAFCO) on November 10, 2021 adopted the 2021 Strategic Plan. The process to prepare the 2021 plan included the following:

- Identification of the agency's strengths, weaknesses, opportunities and threats (S.W.O.T process)
- Adoption of new mission statement:
"OC LAFCO serves Orange County cities, special districts, and the county to ensure effective and efficient delivery of municipal services."
- Established Three Year 2021-2024 Goals:
 - ▣ Optimize external communication.
 - ▣ Facilitate a continuing dialogue of South County governance options.
 - ▣ Refine and enhance the MSR process.

As of June 30, 2022, the goals and most objectives had been completed.

The Process

With an updated mission statement and substantial completion of the three-year goals and objectives identified in 2021, the Commission retained Kelly Associates Management Group (KAMG) to facilitate the process for the preparation of a new three-year plan 2022-2025. KAMG began the process by introducing the "Steps in the Strategic Planning Process" outlined as follows:

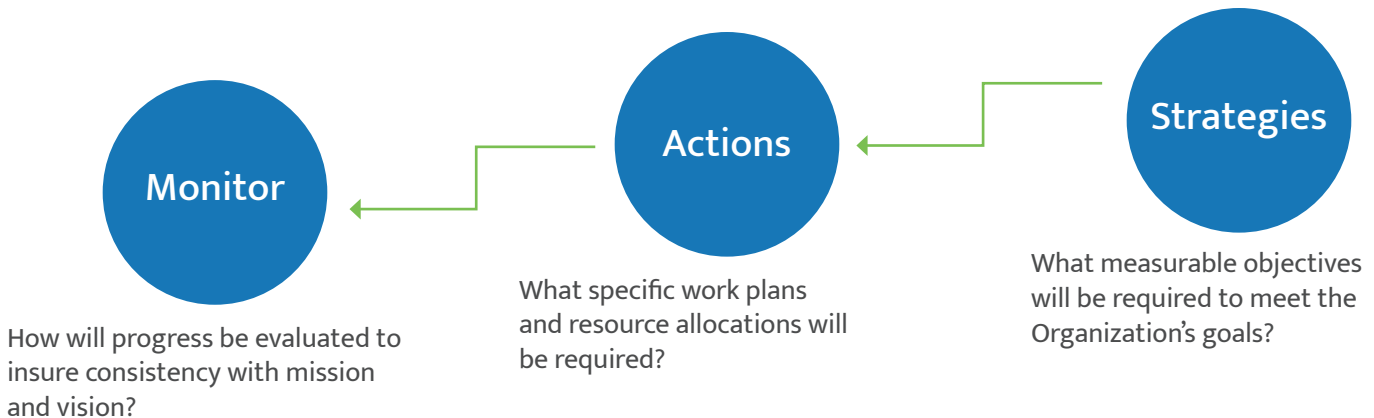
Why does the organization exist and how does it meet community needs?

What does the future of the community and organization look like?

What needs to be accomplished in order to fulfill the mission and achieve the vision?

POLICY
OC LAFCO Commissioners

IMPLEMENTATION
OC LAFCO Staff



Goal-Setting and Identification

The initial step in OC LAFCO's most recent strategic planning process included an update to the agency's S.W.O.T responses. This was done by KAMG circulating a S.W.O.T questionnaire to Commissioners and staff to assist in the preparation of the new strategic plan. The cumulative summary of the S.W.O.T exercise responses is appended to this document.

At the strategic planning workshop conducted on July 13, 2022 the S.W.O.T responses were displayed for review and discussion by OC LAFCO Commissioners and staff. During the meeting, each commissioner was asked to identify his/her top five out of 24 goals of the agency over the next three years. Based on this exercise, the following five goals were identified (not in priority order):

- 1: Succession Planning.
- 2: Further refine Municipal Service Reviews (MSRs) to develop an abbreviated document for future cycles.
- 3: Legislative Engagement – build coalitions with CALAFCO, CSAC, CSDA, cities, League of California Cities and LAFCOs statewide on policy issues of mutual interest.
- 4: Increased Communication with all interest groups – on agenda for organizations such as OCCOG, ACCOC, Special Districts, Regional Chamber/business groups etc.
- 5: Commission can create more analytics or performance standards for quantifying MSRs.

2022-2025 Work Plan

As directed by the Commission, the five goals identified by the Board have been refined by staff and KAMG to allow for implementation of respective objectives to effectively accomplish each goal. As a note, goals #2 and #5 were combined for efficiency as both are relative to the Commission's goal to improve the MSR process.

The 2022-2025 Work Plan depicted in the following section clearly defines the agency's goals, objectives, and schedules over the next three years. As a note, the multi-year work plan may be amended, if warranted, by the Commission.

GOAL 1:

Staff Development, Retention and Recruitment

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
1.1	EO	Conduct Classification, Compensation and Benefits Assessment.	Consultant	2023-2024	Not started
1.2	EO/AEO/CC	Complete staff assessment and conduct recruitment for vacancy(ies).	Consultant	2022-2023	Complete
1.3	EO/CC	Complete cross-training of staff in budgeting and auditing areas.		2022-2023	Underway

GOAL 2:

Improve Municipal Service Review (MSR) Process For Future MSRs

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
2.1	All	Create MSR schedule that eliminates the MSR cycles and identifies the next scheduled comprehensive MSR as five years from last date of agency MSR and SOI review.		2022-2025	Underway
2.2	EO/AEO/ Analyst	Develop criteria for conducting the following MSR and SOI review processes for future reviews: <ol style="list-style-type: none"> 1. Comprehensive 2. Reconfirm 3. Update 	Consultant	2022-2023	Underway
2.3	AEO/Analyst	Develop and distribute the following MSR questionnaires: <ol style="list-style-type: none"> 1. Pre-MSR/SOI – to assess which process will be conducted. 2. Post-MSR/SOI process – to receive feedback on the MSR/SOI process. 		2023-2025 2022	Not started Complete
2.4	AEO/Analyst	Continued use of web-based programs (fiscal indicators, shared services, and MS dashboard) to maintain agency data for MSR determinations.		2022-2025	Ongoing
2.5	AEO/Analyst/CC	Present year-end report to the Commission that provides analytics on MSR agency feedback and the use of the agency's web-based programs.		2023-2025	Underway

GOAL 3:

Promote Legislative Engagement

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
3.1	Commissioners/ EO/AEO	Establish a legislative ad-hoc committee to develop engagement principles and guidelines involving external organizations (CSDA, CSAC, League of CA Cities, OC League of CA Cities).		2022-2023	Not started
3.2	EO/AEO	Monitor key legislation of LAFCO-interest through participation on CALAFCO legislative and advisory committees.		2022-2025	Ongoing

GOAL 4:

Optimize External Communication

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
4.1	All	Conduct annual OC LAFCO 101 sessions (virtual) to engage agencies and public to inform of OC LAFCO activities.		2023-2025	Not started
4.2	Analyst/CC	Conduct visits and disseminate media kits to OC legislators and stakeholders.		2023-2025	Not started
4.3	Analyst	Deploy video FAQs on website to inform OC LAFCO stakeholders.	Consultant	2022	Complete
4.4	EO/Analyst	Distribute bi-annual news to inform of OC LAFCO activities.	Consultant	2022-2025	Ongoing

S.W.O.T ANALYSIS

Strengths | Weaknesses | Opportunities | Threats



STRENGTHS

Characteristics of the agency that will allow OC LAFCO to pursue the agency's goals and be successful.

1. Experienced Staff.
2. Strong Legal Counsel.
3. Very competent executive director with significant experience in LAFCO.
4. The LAFCO staff seemed to have been well trained and competent in their roles within the agency.
5. Knowledgeable and forward-thinking staff.
6. Objective and thorough reports.
7. Legislative Updates to Commissioners.
8. The commitment of staff to uphold the OC LAFCO mission and provide reports that serve the Commission to make well informed decisions.
9. Commission updates.
10. Leadership.
11. Camaraderie among Commissioners.
12. Commissioners come prepared to meetings.
13. Consistent outcomes due to application of standardized approach between staff and the Commissioners.
14. Open door policy between staff and Commissioners enhances communication, collaboration and sets a high bar for productivity and creativity in the decision-making process.
15. Experienced and diverse Board.
16. Governance is strong.
17. We can be an independent/third party oversight aiding with efficiency and fiscal status.
18. We have a diverse commission that represents all public agencies.
19. Diverse Commission and ability to make countywide decisions.
20. Independent and objective agency.
21. Unincorporated Islands program – waiver of application fees.
22. Diverse Commission and ability to make countywide decisions.
23. Independent and objective agency.
24. Provide an unbiased analysis of the level of municipal services provided by local agencies located within the County through municipal service reviews.
25. A Commission committed to uphold the CKH Act and making decisions on what is best for the County and its residents.
26. OC LAFCO is a forward-thinking agency that provides reports and programs to further assist the agencies.
27. Engaged Commissioners who are policy focused in decision making process.
28. Good relationship with County and clients we serve.
29. OC LAFCO has no competitors as an organization.
30. Increased stakeholder outreach has been successful (i.e., Website).
31. Outreach to stakeholders has improved (e.g., OCLAFECO.org).
32. Success achieved when process is proceeded by thorough outreach.
33. Implementation of the new communication plan.
34. Customer Service – Staff assistance with public inquiries, representatives from agencies, and application processing.

STRENGTHS (continued)

STRENGTHS (continued)

- 35. Communication and External outreach to agencies and unincorporated communities.
- 36. OC LAFCO's ability to collaborate with agencies to find solutions that will meet the requirements provided within the CKH Act.
- 37. Community outreach.
- 38. Budget is dependable.
- 39. Revenues are guaranteed.
- 40. Both staff and Commissioners partake in continued education to learn the latest best practices and organizational development techniques.
- 41. Records Management has significantly improved (digitized).
- 42. New web site has provided more information to elected officials and the community at-large.
- 43. Innovative tools (shared services, MSR dashboard, fiscal indicators) to assess agencies and keep data relevant.

WEAKNESSES

Characteristics of the agency that hinder OC LAFCO's ability to achieve the agency's goals.

- 1. Succession planning.
- 2. At times, less than market rate compensation has led to staff turnover.
- 3. Small employee team limits upward mobility in the organization and reduces the overall bandwidth of taking on additional MSR and other types of work.
- 4. We need to provide a greater level for personal growth and career enhancement for the Executive Director and staff members.
- 5. Milestones delayed (i.e., MSRs).
- 6. Commissioners could be more collaborative with each other and stakeholders.
- 7. The ability to discuss other agencies' effectiveness.
- 8. Competing mandated applications – Limited staffing directs office focus to applications.
- 9. Misconception that LAFCOs are proactively seeking to dissolve and consolidate agencies.
- 10. Misunderstanding the purpose and mandates associated with municipal service reviews.
- 11. LAFCOs have a bigger role than just processing application.
- 12. Political influences.
- 13. Lack of knowledge of what LAFCO does/our role.
- 14. Letting social media influence our decisions.
- 15. Historically, poor communication with the public. Improvements have been made the past year with revised web site and monthly report to elected officials.
- 16. The public at-large does not know or understand the existence and role of the commission.
- 17. Not clear understanding by external stakeholders of LAFCO's purpose and authority.
- 18. Difficult to inform and make aware 3M resident of LAFCO's existence, resources and value.
- 19. Unincorporated areas don't understand fiscal impacts of incorporation.
- 20. Need to spend more time with special districts so they understand the LAFCO laws and procedures.
- 21. We need to be more proactive in promoting the work and services of OC LAFCO.
- 22. Reliance on consultants.
- 23. Budget is very modest.
- 24. Resources – Consider studying internal and external resources to improve OC LAFCO's economical, effective, and efficient performance... particularly related to the cost, quality, and timeliness of MSRs.
- 25. Limited staff and budget resources.
- 26. Limitations in OC LAFCO fees changes to member agencies has a domino effect in not being able to attract and retain more senior employees with significant LAFCO experience.
- 27. Website Analytics – Provide monthly updates during Commission meetings.

OPPORTUNITIES


Factors that are available in the environment that can help OC LAFCO achieve the agency's goals.


1. Succession plan.
2. We will have new commissioners with new perspectives.
3. Further streamline MSRs to develop an abbreviated document for future cycles.
4. Improving on the accuracy of the fiscal trends program.
5. Making sure everyone in the commission is using the communication plan.
6. Assist agencies that are fiscally challenged through studies or exploring opportunities.
7. Agencies use of the Shared Services and Fiscal Indicators to assist with fiscal challenges.
8. OC LAFCO has the opportunity to provide assistance to agencies by performing studies that can assist an agency to find solutions to problems.
9. Assist agencies and residents with organizations and reorganizations in the areas where there are illogical boundaries.
10. The MSRs can provide agencies with the information required to make decisions on the delivery of services.
11. Homelessness.
12. If OC LAFCO can attract new business, it will be able to augment the financial capacity and allow for more variety in its service provider model and gives staff an opportunity to expand the learning curve.
13. Legislative Engagement – Build coalitions with Cal LAFCO, CSAC, CSDA, cities, League of California Cities and LAFCOs statewide, on policy issues of mutual interest.
14. Increased Communication with all interest groups – on agenda for organizations such as OCCOG, ACCOC, Special Districts, Regional Chamber/ business groups, etc.
15. Assist stakeholder entities on their implementation/interest in Shared Services to the extent that OC LAFCO needs to be involved.
16. Stakeholder Engagement and Transparency – Study and learn from other LAFCOs and stakeholders statewide to implement more effective strategies and tactics for reporting OC LAFCO performance.
17. Continued rebranding of LAFCO resources to keep stakeholders engaged.
18. Commission can facilitate better communication about the differences of county services versus city services to unincorporated area or county islands.
19. Commission can create more analytics or performance standards for quantifying MSRs.
20. Hybrid zoom meetings.
21. Use social media wisely to the advantage of the commission.
22. Continued use of technology as it continues to evolve.
23. Seeking out the latest technology to utilize is good for staff and can expand beyond the basic service model of the organization.
24. Enhancing the website and messaging out to current and potential clients reminds people of what we do and how we can help them in their decision-making process by providing analytical data.

THREATS

Pitfalls looming in the environment that could throw up roadblocks or otherwise keep the OC LAFCO from achieving the agency's goals.

1. Executive Office retirement or movement to another organization.
2. Lack of upward mobility with such a small team means that talented employees will ultimately get hired away elsewhere.
3. Noncompetitive compensation means that we will continue to lose good employees to others in the market.
4. If there is a lack in variation in the day to day work employees will get stagnant and seek out other job opportunities elsewhere.
5. Leadership and staffing changes leave a void in the overall organization.
6. South OC issue will be a politically challenging process due to varied interests.
7. The commission is split on which direction the commission should proceed in.
8. Not every commissioner is using the communication plan.
9. If agency input is not balanced, the perception of LAFCO's mission and authority may be misunderstood.
10. Economic impacts on cities and special districts.
11. Environmental threats on the delivery of municipal services.
12. Rising gas prices.
13. State laws or mandates that omit LAFCOs from a local government reorganization process.
14. The major threat to the commission is any legislation that requires the commission to operate differently or being required to become involved with government agencies more broadly than currently required.
15. Ill-informed entities.
16. Misperception that LAFCO is a "rubber stamp" agency.
17. The perception agencies have of OC LAFCO.
18. The perception of what an MSR is intended to provide for the Public, Local Agencies, and Legislature.
19. Meeting space availability.
20. Fiscal instability.
21. Remote work – future pandemic.
22. Cybersecurity and Information Technology – Like many government entities today, OC LAFCO should protect the organization – and its stakeholders – from online vulnerability.
23. Misuse of social media.

<div>  <div> OC LAFCO 4TH Cycle - Municipal Service Review (MSR) and Sphere of Influence Update (SOI) Program YEAR 2022-23 </div> </div>			
MSR Region	Areas of Interest	Cities	Special Districts
Southwest <i>(in-progress)</i>	<ul style="list-style-type: none"> ■ Public Works ■ Water <ol style="list-style-type: none"> 1. Agency collaboration on urban water run-off and water treatment. 2. Collaboration between water districts and cities. 3. Impacts of water conservation. 4. Water reliability. ■ Possible opportunities for consolidation of districts. 	Aliso Viejo Dana Point Laguna Beach Laguna Hills Laguna Niguel Laguna Woods	Capistrano Bay CSD Emerald Bay CSD El Toro WD Laguna Beach County WD Moulton Niguel WD South Coast WD Three Arch Bay CSD South Orange County Wastewater Authority(JPA)
West <i>(in-progress)</i>	<ul style="list-style-type: none"> ■ Public Safety (Police and Fire) <ol style="list-style-type: none"> 1. Utilization of shared service models to decrease costs of services and maximize delivery efficiency. 2. Shared services database for areas that include: detectives, SWAT, traffic enforcement. 3. Fiscal sustainability. 4. Political pressures. 5. Internal and external demands to maintain level of services with increasing costs. 6. Maintaining related pension costs. 7. Providing the most efficient and cost-effective services to residents. ■ Parks and Recreation ■ Fiscal sustainability of maintenance of facilities and programs with scarce resources. ■ Public Works <ol style="list-style-type: none"> 1. Achieving economies of scale. 2. Shared services database that includes: operational and staffing costs; population growth impacts on infrastructure and land use. 	Cypress Buena Park Garden Grove Fountain Valley La Palma Stanton Westminster	Buena Park LD Cypress Rec. & Park District Garden Grove SD Midway SD
Orange County Water District <i>(in-progress)</i>	<ul style="list-style-type: none"> ■ Water: recycled water efforts, addressing the drought and water conservation. ■ Use of MSRs as tool/resource to update on services provided by the district. ■ Focused review of potential consolidation of OCWD and MWDOC 	Countywide District	


<div>  <div> OC LAFCO 4TH Cycle - Municipal Service Review (MSR) and Sphere of Influence Update (SOI) Program YEAR 2023-24 </div> </div>			
MSR Region	Areas of Interest	Cities	Special Districts
Central	<ul style="list-style-type: none"> ■ Police ■ Public Works <ol style="list-style-type: none"> 1. Affordable housing. 2. Lack of alignment regarding Infrastructure limitations and legislative mandates on affordable and regular housing. 3. Population growth demands on existing infrastructure. ■ Accessory dwellings' impact on service delivery. 	Anaheim Irvine Orange Santa Ana Tustin Villa Park	East Orange County WD Irvine Ranch WD Serrano WD Silverado-Modjeska Parks & Rec. District
Southeast	<ul style="list-style-type: none"> ■ Public Works <ol style="list-style-type: none"> 1. Location and condition of public infrastructure. ■ Police <ol style="list-style-type: none"> 1. Fiscal sustainability of increasing costs of contracts with County Sheriff. 2. Impacts of and ability to maintain related pension costs. ■ Water <ol style="list-style-type: none"> 1. Water quality involving low flow run-off issues. 2. Assistance for agencies from treatment agencies on flow diversion and low flow funding mechanisms. 3. Water rate structures and conservation. 	Lake Forest Mission Viejo Rancho Santa Margarita San Clemente San Juan Capistrano	El Toro WD Irvine Ranch WD Moulton Niguel WD Santa Margarita WD South Coast WD Trabuco Canyon WD South Orange County Wastewater Authority(JPA)
Orange County Vector Control District	<ul style="list-style-type: none"> ■ Public Works: mosquito breeding and conveyance systems. ■ Parks and Recreation: mosquito breeding and lack of grounds maintenance. 		Countywide District



OC LAFCO
4TH Cycle - Municipal Service Review (MSR) and Sphere of Influence Update (SOI) Program

YEAR 2024-25

MSR Region	Areas of Interest	Cities	Special Districts
North	<ul style="list-style-type: none"> ■ Fire and Emergency Response <ol style="list-style-type: none"> 1. Integration of fire and water services for more effective response during emergency and disaster events. 2. Consolidation of internal services (i.e. procurement, HR, training). 3. Regionalization of service delivery involving medical calls and reduction in costs. 4. Maintaining of adequate fire suppression. ■ Police <ol style="list-style-type: none"> 1. Consolidation of specialty services that may include: CSI, dispatch, commercial and traffic enforcement. 2. External issues involving consolidation of departments. ■ Shared Services <ol style="list-style-type: none"> 1. Maximizing of funding opportunities supported by County for unincorporated islands. 2. Shared service models to increase funding for additional services that may include: IT, purchasing, training, HR, class comps. ■ Development of shared services system for areas such as: landscape and fleet maintenance. 	Brea Fullerton La Habra Placentia Yorba Linda	Placentia LD Yorba Linda WD
Coastal	<ul style="list-style-type: none"> ■ Public Works <ol style="list-style-type: none"> 1. Public outreach for better understanding of the financing of infrastructure. 2. Correlation of level and cost of services. 3. Economies of scale and potential shared services system for areas such as: fleet, tree trimming, and purchasing. ■ Solid Waste <ol style="list-style-type: none"> 1. Impacts of having fewer haulers on competitive bidding and rates. ■ Parks and Recreation ■ Police <ol style="list-style-type: none"> 4. Impediments involving consolidation of agencies Shared services database that includes: operational and staffing costs; population growth impacts on infrastructure and land use. 	Costa Mesa Huntington Beach Los Alamitos Newport Beach Seal Beach	Costa Mesa SD Irvine Ranch WD Mesa WD Rossmoor CSD Rossmoor/Los Alamitos SD Sunset Beach SD Surfside Colony CSD Surfside Colony SWSD

	<p style="text-align: center;">OC LAFCO Municipal Service Review (MSR) and Sphere of Influence Update (SOI) Program</p> <p style="text-align: center;">COMPLETED MSR's</p>			
MSR Region	Services Provided	MSR Approved	SOI Status	Next Scheduled MSR
County Service Area Nos. 13, 22, and 26	Fund wastewater and park and recreation services countywide and within unincorporated areas adjacent to the cities of Buena Park and Yorba Linda.	August 2022	Reconfirmed	2027
Municipal Water District of Orange County	Manages Orange County's imported water supply and resource planning, with the exception of the cities of Anaheim, Fullerton, and Santa Ana.	September 2020	Reconfirmed	2025
Orange County Cemetery District	Owns and operates three public cemeteries located in the cities of Anaheim, Lake Forest and Santa Ana.	October 2022	Reconfirmed	2027
Orange County Sanitation District	Provides regional sewer collection and treatment for 20 cities, four special districts (containing five cities), and several unincorporated areas generally located in the northern and central parts of the County.	September 2020	Reconfirmed	2025