

REGULAR MEMBERS

CHAIR

Donald P. Wagner
County Member

VICE CHAIR

Wendy Bucknum
City Member

IMMEDIATE PAST CHAIR

Douglass Davert
Special District Member**James Fisler**

Special District Member

Peggy Huang

City Member

Derek J. McGregor

Public Member

VACANT

County Member

ALTERNATES**Kathryn Freshley**

Special District Member

Carol Moore

City Member

Lou Penrose

Public Member

VACANT

County Member

STAFF**Luis Tapia**

Interim Executive Officer

Scott Smith

General Counsel

MEETING DATE: September 17, 2025**TO:** Local Agency Formation Commission
of Orange County**FROM:** Interim Executive Officer
Policy Analyst I**SUBJECT:** Bi-Annual News ("The Pulse")**BACKGROUND**

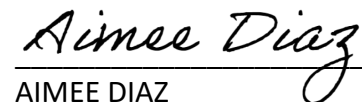
The bi-annual newsletter "The Pulse" is an objective under Goal Three: Optimize Communication, included in the Commission's three-year Work Plan 2025-2028. The newsletter is published twice a year and features multiple summaries of projects, events, and initiatives undertaken by the Commission and its staff. The editions of the newsletter are distributed to the County Executive Officer, each of the 34 cities and 34 independent and dependent special districts (i.e., Clerks, City Managers, and General Managers), Orange County legislators, Independent Special District of Orange County (ISDOC), California Local Agency Formation Commission of Orange County, Alliance of California Local Agency Formation Commissions, and included in the media kit and posted on the OC LAFCO website.

RECOMMENDED ACTION

Staff recommends the Commission:

1. Receive and file the bi-annual newsletter, "The Pulse."

Respectfully Submitted,


LUIS TAPIA
AIMEE DIAZ

Attachment: The Pulse, Summer 2025



City of
Yorba
Linda



The OC LAFCO landscape reflects a season of transition, marked by the close of a multi-year work plan and early progress on the new three-year 2025-2028 Work Plan. This edition of The Pulse highlights recent appointments, key accomplishments, and summary of the newly adopted 2025-2028 Work Plan shaping agency's future goals.



Looking Ahead: New Appointments, New Goals, New Talent

As the 2022-2025 Work Plan came to a close, the Commission convened its 26th Strategic Planning Workshop to establish the new goals and objectives of the agency for the next three fiscal years. The Commission adopted a new three-year 2025-2028 Work Plan, which outlines the agency's goals and reflects OC LAFCO's Mission Statement. In tandem with the approval of a Work Plan, the Commission has welcomed new Commissioner appointments and a new staff member.

This edition of the Pulse highlights recent Commission appointments updates on Commission activity, the fourth cycle of MSRs, and a

look into the California Public Records Act and LAFCO, written by OC LAFCO's general counsel. It also includes a summary of the agency's latest legislative activity and interregional collaboration through the newly formed Alliance of California LAFCOs.

Did You Know?



Over the past decade, the Commission has conducted Municipal Service Reviews for a total of 45 cities and special districts.



SUMMER EDITION

Contents

- 2 Commission Activity
- 3 A New Sunrise Brings in the 2025-2028 Workplan
- 4 Municipal Service Reviews
- 5 Legislative Corner
- 6 California Public Records Act and LAFCO
- 7 From Screens to Streams: Connecting Online
- 8 Meet the Team

Commission Activity

Over the past few months, the Commission has welcomed the appointment of two Commissioners, appointed two OC LAFCO members to the Alliance of California Local Agency Formation Commissions, and adopted its new three-year 2025-2028 Work Plan. Below are summaries highlighting the Commission's recent key activity.

OC LAFCO Appointments

In accordance with state law, OC LAFCO Commissioners serve four-year terms with no term limits. Over the past year, the Commission welcomed Commissioner Peggy Huang from the City of Yorba Linda as the Regular City Member, following her appointment by the City Selection Committee to a term that began on July 1, 2022 and ends on June 30, 2026. Additionally, the Commission conducted the selection process for the appointment of an Alternate Public Member, which concluded with the reappointment of Commissioner Lou Penrose on July 9, 2025, for his third term (July 1, 2025 through June 30, 2029). To learn more about the appointment process and current terms for OC LAFCO members, click [here](#).



The Alliance of California LAFCOs

In May 2025, the Commission approved a Memorandum of Understanding (MOU) with the Los Angeles, San Bernardino, and San Diego LAFCOs to establish a collaborative partnership focused on sharing services, educational opportunities, and professional networking, with an emphasis on legislative advocacy. To support this collaboration, the Commission appointed Commissioner Derek J. McGregor as the Regular Member and Commissioner Peggy Huang as the Alternate Member to represent OC LAFCO's interests in the Alliance.

City of
San Juan
Capistrano

Commissioners and staff met on August 11, 2025, to discuss several topics related to the Alliance, including the branding of the group, a mission statement, legislative affairs, the creation of bylaws, and governing structure.

Following a robust discussion and key feedback from Commissioners McGregor and Huang, the Alliance recommended that the Executive Officers of the four LAFCOs schedule future meetings to address one or two items with recommended actions. During the meeting, attendees approved the Legislative Policies and Guidelines to assist the Alliance in reviewing key legislation and adopting positions for the upcoming legislative session, which is set to begin at the end of the year. The next meeting of the Alliance is scheduled on Monday, September 22, 2025 at 2:00 p.m.



Did You Know?

OC LAFCO has overseen 23 boundary changes over the past decade, including city and district annexations, detachments, and reorganizations.

A New Sunrise Brings in the 2025-2028 Workplan



The Commission held its 26th Strategic Planning Workshop on April 4, 2025, to develop its new three-year Work Plan 2025-2028. Facilitated by William “Bill” Kelly, president and CEO of Kelly Associates Management Group LLC, the workshop focused on evaluating the agency’s previous three-year Work Plan and identifying strategic priorities for the next Strategic Plan. Mr. Kelly, who previously facilitated the 2022 workshop, guided the Commission through a review of the agency’s existing goals and objectives. Commissioners participated in a structured discussion aimed at assessing progress to date and defining forward-looking initiatives aligned with OC LAFCO’s mission.

Following the workshop, the Commission formally approved the three-year Work Plan for Fiscal Years 2025-2028. A full version of the work plan is available at ocla Alco.org. Below is a summary of the adopted goals and objectives of the Work Plan.



City of
Anaheim

Goal One: Staff Development, Retention, and Recruitment



- ◆ Conduct Classification, Compensation and Benefits Assessment.
- ◆ Prepare a Succession Plan by identifying and developing a strategic process for successors for key positions at OC LAFCO.
- ◆ Complete Staff Assessment and Conduct Recruitment for Vacancy(ies).

Goal Two: Improve Municipal Service Review (MSR) Process for Future MSRs



- ◆ Develop criteria for future MSRs.
- ◆ Use of web-based programs (fiscal indicators, shared services, and MS dashboard) and update data.
- ◆ Develop pre- and post-MSR surveys.
- ◆ Analytics reports.

Goal Three: Promote Legislative Engagement



- ◆ Use agency communications tools to engage agencies and public to inform of OC LAFCO activities.
- ◆ Distribute bi-annual news to inform agencies of OC LAFCO activities.
- ◆ Conduct visits and distribute media kits to OC legislators and stakeholders.

Goal Four: Optimize External Communications



- ◆ Establish an MOU with the Southern Region LAFCOs.
- ◆ Distribute bi-annual news to agencies and stakeholders to inform them of OC LAFCO activities and efforts by the southern region LAFCOs.
- ◆ Target areas of collaboration with legislative, educational, and professional associations and groups.
- ◆ Conduct visits and provide information to stakeholders to inform them of OC LAFCO activities and establish relationships.
- ◆ Develop mechanisms to monitor key legislation of LAFCO interest with the southern region LAFCOs.

Municipal Service Reviews

Over the past months, OC LAFCO has continued to make progress on preparing fourth-cycle MSRs and sphere reviews for cities and special districts responsible for providing municipal services in Orange County. The MSR schedule for the current cycle is posted on the OC LAFCO website, click [here](#). Be sure to check the schedule periodically, as it is reviewed and updated as needed. Below is an update on MSRs that are currently underway.



Central MSR Region

During August 2025, staff released the Public Review draft for the Central MSR Region for a 30 day review period from July 18 to August 18. In collaboration with Commission staff, RSG Inc., a firm hired by the Commission to prepare the MSR, has engaged agencies within this region to assess the municipal services they respectively provide. Some topics included in the report are public safety, the adequacy of water and wastewater infrastructures, foreseeable proposed changes to the agencies' boundaries, shared services arrangements, and fiscal analysis. The MSR will include a fiscal analysis prepared by fiscal expert Richard Berkson of Berkson Associates, who, in collaboration with staff, developed the fiscal indicators for the MSR using data collected from audits, annual comprehensive reports, budgets, and feedback from agencies. The Final Draft MSR is scheduled for the Commission to receive a presentation during a public hearing on Wednesday, September 17, 2025. The Central region includes the following agencies:

Central MSR Region	
City	Special District
Anaheim	East Orange County Water District (East Orange)
Irvine	Irvine Ranch Water District (IRWD)
Orange	Serrano Water District (Serrano)
Santa Ana	Silverado-Modjeska Recreation and Parks District (SMRPD)
Tustin	
Villa Park	

North MSR Region

The next fourth-cycle MSR on the Commission’s calendar is the North MSR Region. Staff has initiated the process of moving forward with the MSR by conducting a Request for Proposals (RFP), which was made available to the public from June 19 through July 25. The RFP was released to approximately 20 firms, and following a review of the responses, staff will be recommending a consultant during the Commission’s regular meeting scheduled on Wednesday, September 17, 2025. The North MSR includes the following agencies:

North MSR Region	
Cities	Special Districts
Brea	Yorba Linda Water District
La Habra	Placentia Library District
Fullerton	
Placentia	
Yorba Linda	



OC San
Sanitation
Plant

Legislative Corner

Over the course of the three year work plan, OC LAFCO has remained proactive in monitoring and shaping legislation. This section highlights the Commission's positions on proposed bills, its outreach efforts, and how its legislative strategy is adapting for the future.



Through the use of the Commission's legislative policy and guidelines, OC LAFCO staff continued to monitor legislation of LAFCO interest and provided summaries with recommendations for Commission consideration during the three-year Work Plan 2022-2025. During the three-year workplan, the Commission adopted 18 positions on proposed legislation, of which 16 of those bills were signed by the Governor. Additionally, the Commission adopted a position on a proposed federal bill sponsored by the California Special Districts Association, focusing on establishing a definition of special districts under federal law.

In addition to the Commission's active role in monitoring legislation and adopting positions, staff also conducted external outreach with new legislators and stakeholders, a component of the Commission's legislative engagement. During the course of the Work Plan, staff held meetings with incoming California Senators and Assembly members to provide them with an introduction of OC LAFCO and an overview of the Commission's current activity and media kit. Additionally, staff met with city managers and general managers to provide updates on OC LAFCO activity.

Concurrently with the start of the new three-year Work Plan, OC LAFCO did not renew its membership with the California Association of Local Agency Formation Commissions (CALAFCO), which also ended staff's ability to participate as a member of the CALAFCO Legislative Committee. The legislative committee served as a platform for staff to identify legislation of interest to OC LAFCO and LAFCOs, which was presented to the Commission for recommended action. With the start of the new three-year Work Plan, staff will work with the recently formed Alliance of California Local Agency Formation Commissions (Alliance), which includes Los Angeles, Orange, San Bernardino, and San Diego to review and identify legislation of interest that may require an action by the Commission.



Did You Know?

For OC LAFCO, boundary changes between cities are more common than special districts, accounting for approximately 70% of the boundary changes in the last decade.



BBK

BEST BEST & KRIEGER LLP

California Public Records Act and LAFCO



Scott Smith

In collaborating with LAFCO in their proposals for boundary or service changes or in updating their regular municipal service reviews, local agencies may wish to share with LAFCO information they might otherwise consider confidential or privileged. For example, a city negotiating a pending pre-annexation agreement with a developer may find it helpful to share its negotiating stance with LAFCO as LAFCO contemplates the city's plan for services for the annexation area. A city facing vulnerabilities in its service capabilities may have important information about sales tax sources, audit comments, or even grand jury communications that it wishes LAFCO to consider, but which the city still considers confidential.

The California Public Records Act grants the public a right to access public records transmitted to or held by LAFCO, which can encompass any documents or communications related to the conduct of public business.¹ Although this right is not unlimited, courts interpret the right of access broadly while interpreting any exceptions to disclosure narrowly.² Thus, marking transmittals to LAFCO "confidential" has no real effect on whether those documents are in fact subject to PRA disclosure, even if they were exempt at city hall prior to the transmittal. Because most information transmitted to LAFCO pertains to the conduct of public business, it is presumed to fall within the PRA's broad definition of a public record.

Materials may still be exempt from disclosure at their home agency if a specific exemption applies, such as the attorney-client privilege or the "preliminary draft" exemption.³ However, the attorney-client privilege that may protect records held or maintained in the sole custody of a local agency and its counsel, may no longer apply when shared outside the relationship between that agency and its counsel, i.e., with LAFCO. It is also difficult to argue that an agency's inclusion of materials in its application package to LAFCO is a "preliminary draft" of a document not "ordinarily retained in the ordinary course of business."⁴ Those documents are almost always in final form. Whether a specific exemption applies depends on the content and context of the record; however, more likely than not, in sending documents "over the net" to LAFCO, affected agencies that considered those documents confidential should assume that their qualification for a PRA exemption lapses with that transmittal to LAFCO.

SCOTT C. SMITH of Best Best & Krieger LLP, General Counsel Orange County LAFCO

¹ Gov. Code, § 79250.545.

² City of San Jose v. Superior Court (2017) 2 Cal.5th 608, 617.

³ Exceptions to the PRA's disclosure rules are found in Government Code §§ 6254 and 6255.

⁴ See Gov't Code § 6254(a).

From Screens to Streams: Connecting Online

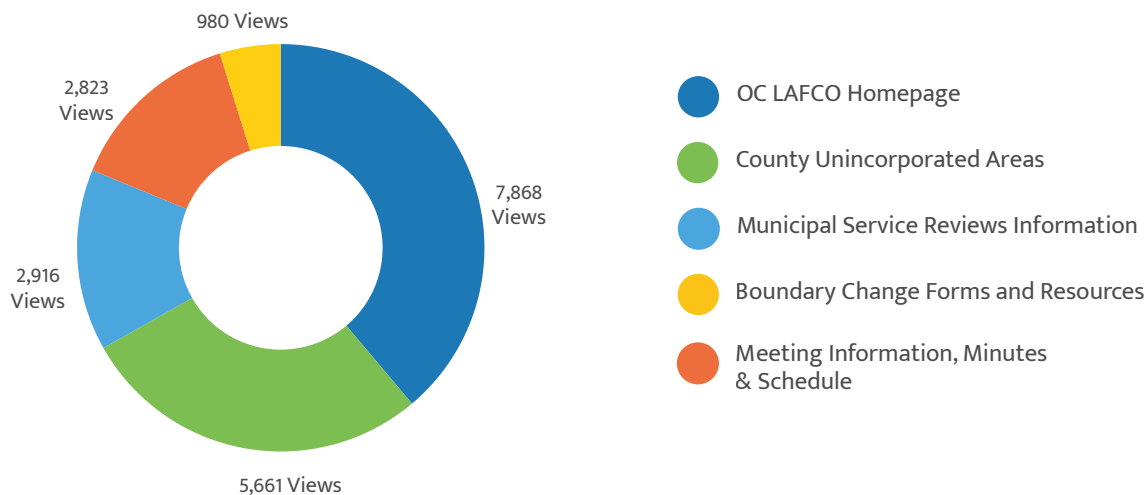
Over the past year, OC LAFCO’s digital presence has grown steadily, with notable increases in engagement on both the agency’s website and YouTube channel. Read on to see how these platforms are enhancing public access and transparency.



Website Metrics

Over the past year, OC LAFCO’s website has received over 27,000 page views, reflecting sustained public engagement with the agency’s work. Visitors explored a range of content, with particular interest in meeting agendas, application procedures, and agency operations. The chart below highlights the top five most visited pages during the last year. While these pages account for a significant portion of overall traffic, they represent just part of the broader site activity captured in the annual total.

Top Five Visited OC LAFCO Webpages

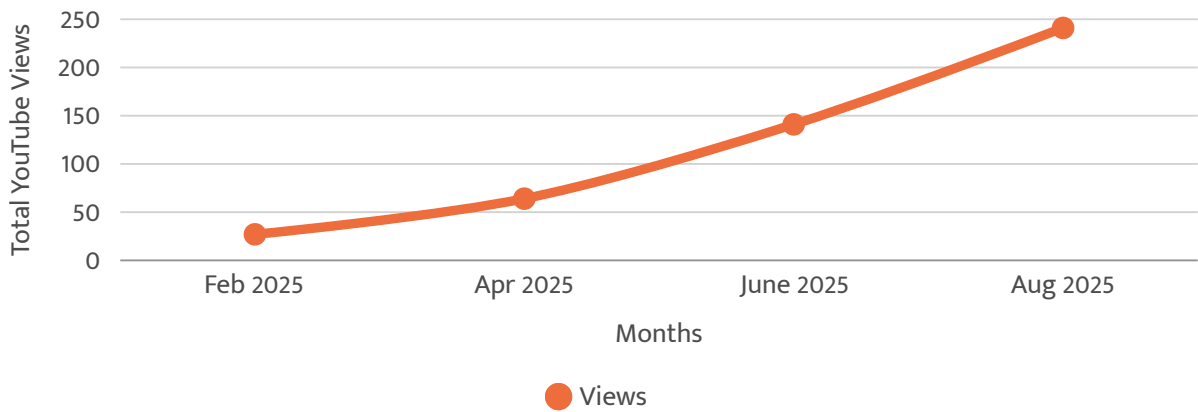


YouTube Performance

In February 2025, the Commission began audio live-streaming its regular meetings through a YouTube channel to further enhance the agency’s transparency. The Commission took a further step and implemented video livestreaming of its regular meeting in June 2025. The video livestreaming total views demonstrate an increase of almost 90 percent since the first audio livestream was introduced. The graph below shows the overall increase in views since February 2025, reflecting a growth in public engagement.

To follow along with OC LAFCO, visit oclafco.org or subscribe to the Agency’s YouTube channel @OrangeCountyLAFCO.

OC LAFCO YouTube Channel Views



Meet the Team: New Faces and Staff Stars



OC LAFCO Analyst Recruitment

In May 2025, OC LAFCO staff began the recruitment process for a Policy Analyst I. To attract top-tier talent, staff attended the University of California, Irvine Department of Urban Planning and Public Policy Career Fair to connect with students interested in local government and public policy. The position was also posted to the Orange County Human Resources website, and key employment platforms like LinkedIn, Handshake, and California State University CareerLink, ensuring visibility among a wide range of qualified candidates. This strategic approach resulted in approximately 60 applications. After a comprehensive review and interview process, OC LAFCO staff selected a highly qualified candidate who will bring valuable expertise to support the Commission's Work Plan and Mission Statement.

Leo Lara joins the OC LAFCO team, bringing valuable experience from his recent work with the Irvine Ranch Water District's Water Efficiency team and water policy research with the University of California, Irvine. Having worked hands-on in water efficiency programs, GIS mapping, and legislative research on California's Conservation as a Way of Life framework, he supported compliance tracking and helped evaluate the effectiveness of rebate programs and conservation policies. A recent Master of Public Policy graduate from the University of California, Irvine, with a concentration in environmental and sustainability policy, Leo has developed a strong foundation in policy analysis, data management, and regulatory compliance, making him well-prepared to join the OC LAFCO team.

Leo is looking forward to taking on new challenges, particularly in projects that intersect with water and municipal governance. He is eager to contribute new ideas and collaborate with the team to help ensure efficient and effective delivery of municipal services across Orange County. When not in the office, Leo enjoys exploring new hiking trails in Orange County, traveling, trying out new coffee shops, and scuba diving in the crystal-clear waters of Catalina Island.



Leo Lara
Policy Analyst



Did You Know?

The Commission has received and filed a total of 13 MSRs over the past decade.

Staff Highlight: Commission Clerk and Office Manager Cheryl Carter-Benjamin



Cheryl Carter-Benjamin
Commission Clerk/Officer Manager
Joined OC LAFCO in 2011

For over 15 years, Cheryl Carter-Benjamin has played a pivotal role in the day-to-day operations of OC LAFCO. Before joining the agency, Cheryl worked as a legal secretary, bringing with her a solid foundation in administrative support and attention to detail that continues to serve the agency well.

In her dual role as Commission Clerk and Office Manager, Cheryl ensures that both the Commission's proceedings and the office's internal operations run smoothly. As Commission Clerk, she coordinates Commission meetings, prepares agendas, presents staff reports, and drafts official meeting minutes. As Office Manager, she oversees daily administrative functions, including managing office supplies, processing invoices, and maintaining the agency's records and archives. Cheryl's work often spans multiple functions in a given week, requiring flexibility and collaboration with staff across all areas of the agency.

Cheryl emphasizes the importance of supporting the agency's mission and noted that working with OC LAFCO staff and staff from other LAFCOs has been the most rewarding part of the role. In her spare time, Cheryl enjoys roller skating with her husband, going to the theater to watch recent movie releases, and spending time with family on vacations.