

Placentia, CA
at sunset

Where Does the Time Go?

As we near the close of Year 2023, the Commission has experienced plentiful progress throughout the year with many goals achieved and future objectives off to a really good start. To learn more, check out this edition of *The Pulse*, featuring highlights of the activities of the latter half of fiscal year 22/23 and a push-off into a new fiscal cycle. Another way to catch up on OC LAFCO's latest news is by visiting us at www.oclafco.org. We hope you enjoy the read!



Commissioner Activity

Board Appointment

In June 2023, **Commissioner Bruce Whitaker** was seated as the OC LAFCO Regular City Member. Appointed by the City Selection Committee, which is comprised of the 34 city mayors, Commissioner Whitaker brings many years of experience to the Commission. He has served with the City of Fullerton as a council member since 2010 and a board director with the Orange County Water District in his most recent appointment since



Commissioner Whitaker

2021. Commissioner Whitaker's public participation also includes other regional boards, including the Santa Ana Watershed Project Authority.



FALL EDITION



Contents

- 1 Commissioner Activity
- 3 Agency Report Card
- 5 The Coming of 2024
- 6 Agency Spotlight
- 7 Reflections from Chair Doug Davert

Commissioner Carol Moore Shares Thoughts on Attending Her First CALAFCO Conference

“The conference opened very early the first morning with a mobile workshop held at the host county’s modest-sized airport. The Monterey Airport is within an airport district that is under the jurisdiction of Monterey LAFCO. The District staff provided small group tours of airport operations as well as presentations regarding issues involved with needed airport expansion and the corresponding challenges. The airport is a product of less planning and more happenstance.

Returning later that morning and over the following days, we had the opportunity to interact with conference attendees from other regions and learn about the different interests and challenges of other LAFCOs. During one of the conference sessions, two very different Counties were featured. Resolving the same issue in a rural milieu can be quite different from puzzling out a resolution in an urban setting. Their issues were as dissimilar as their answers, confirming one-size does not fit all.



Commissioner Moore

As a newbie to LAFCO, my takeaways from the conference were positive on several levels; with the representatives from the various LAFCOs, with the respective discussions, and with the absence of any apparent ideology. I’d also note that our county is well-represented by **Commissioner Derek McGregor** who serves on the CALAFCO Board, and OC LAFCO is not sitting on the sidelines.”



In Memoriam of Dr. Allan Bernstein

OC LAFCO acknowledges the dedicated service of

Dr. Allan Bernstein,

fondly known as “Doc,” who sadly passed away this past Spring. In addition

to serving on the Tustin City Council and other Orange County regional boards,

Dr. Bernstein’s commitment to public service included serving on OC LAFCO as the City Member from 2014 to 2020. During his tenure as a Commissioner,



Allan was a key contributor to the Commission’s approval of several key jurisdictional changes and MSRs. He is remembered most for the experience and civic

engagement he brought to his role as a Commissioner, and OC LAFCO expresses our appreciation and honors his service to the Commission.


Agency Report Card

The accomplishments of the Commission during the past fiscal cycle included the completion of key milestones of the agency's Three-Year Strategic Plan, processing of applications for annexations and reorganizations, conducting of multiple MSRs, and enhancements to varying components of the Commission's ongoing communication plan. The report card below provides an overview of the agency's performance during the previous fiscal year and a glimpse of OC LAFCO's activities during the beginning of fiscal year 23/24. To summarize the Commission's work, an agency report card has been developed. Here is how the agency is doing...

OC LAFCO FY 2022-2023 REPORT CARD

PROJECT OR ACTIVITY	DESCRIPTION	HOW DID WE DO?
Legislative Mandates	<p>The Commission is required to process applications for changes of organization and a reorganization and to conduct MSRs at least once every five years in accordance with State law and local policy. Over the past year, the following mandates were completed:</p> <ul style="list-style-type: none"> ● Processed three city and district annexations and a reorganization. ● Conducted MSRs and sphere reviews for the Southwest and West MSR regions. ● Began MSRs focused on vector control services and wide array of municipal services provided in the Central Region of the County. 	<p>Commission action facilitated more logical boundaries and the efficient delivery, financing, and review of municipal services.</p>
Optimizing External Communication	<p>Continued enhancement of communication tools and vehicles for the following:</p> <ul style="list-style-type: none"> ● OC LAFCO Website ● Agency and Community Resources ● Commission Policy and Procedures ● Information and Educational Resources 	<p>Completed the following resource enhancements:</p> <ul style="list-style-type: none"> ● Improvements to website to support more user-friendly and educational experience involving OC LAFCO digital resources. ● Utilized improved fiscal indicators for MSRs and informing agencies of fiscal health. ● Adoption of Limited English Proficiency Services Policy and Guidelines to enhance agency's communication with LEP individuals on key projects and activities.
Legislative Engagement	<p>Proactive monitoring and statewide participation in legislative efforts that affect or may potentially affect LAFCOs.</p>	<ul style="list-style-type: none"> ● Adopted positions of support, oppose and watch on legislation of LAFCO interest. ● Enhanced legislative policy to facilitate engagement of OC LAFCO stakeholders and groups on legislative efforts and proposed legislation of LAFCO interest.
Internal Efficiencies	<p>Implementation of administrative policies and procedures that promote cost-effective and efficient Commission operations.</p>	<ul style="list-style-type: none"> ● Maintained projects, activities and resources within approved budget levels. ● Maintained investment portfolio that exceeded projected investment earnings that may be used for the Commission's retirement costs. ● Received an Unqualified Opinion from independent auditor for fiscal year audited financial statements. ● Established a Health Care Reimbursement benefit to facilitate future staff retention and competitive recruitment opportunities.

CONTINUED 



Huntington
Beach, CA



AGENCY REPORT CARD

Legislative Affairs

On October 14, the legislative session came to an end with **Governor Newsom** signing eight bills monitored by OC LAFCO. During the session, the Commission adopted positions of support and oppose on four of the bills, while maintaining a watch position on the others. The 2024 legislative session is set to begin next month, and OC LAFCO staff will be participating in a legislative meeting on January 12, 2024 to discuss expectations for the new session.

In concert with the Strategic Plan, during the latter part of fiscal year 22/23, the Commission formed a legislative ad hoc committee charged with developing guidelines on how and when to engage external organizations on key legislative efforts and bills of potential impact to LAFCOs.

Engaging and Informing through MSRs

OC LAFCO municipal service reviews (MSRs) are not intended to be bound piles of pages that sit on a bookshelf. Often a multi-year process, MSRs are prepared by the Commission to engage our local agencies and inform Orange County communities on how municipal services are delivered and sustained throughout the County. OC LAFCO, in concert with a five-year MSR schedule adopted by the Commission, prepares, on average, two to three studies each year. For the current cycle that began in 2020, the Commission has completed MSRs for 31 cities and special districts. Completion of these MSRs represents a significant accomplishment, and the Orange County Mosquito and Vector Control District and Central Region MSRs are underway. While the District's MSR will focus on the provision of vector control services countywide, the Central Region MSR will review multiple cities (Anaheim, Irvine, Orange, Santa Ana, Tustin, and Villa Park) and special districts (East Orange County Water District, Irvine Ranch Water District, Serrano Water District, and Silverado-Modjeska Parks and Recreation District). An RFP to assist in the preparation of the MSR has been published with an expectation that the MSR will be completed by end of Summer.



Tustin, CA

The Coming of 2024

With the arrival of the new year, there are several anticipated projects and activities on the horizon for OC LAFCO. Read on to learn more about a few of the key ones.

Website Under Construction

Over the past several months, OC LAFCO consultant Chase Design has collaborated with Commission staff and worked diligently to improve existing features and add new ones to the agency's website. Once completed, expect to see improved navigation and translation additions and the launching of the highly-anticipated and enhanced Fiscal Indicators Program and a linked source specifically dedicated to our Municipal Services Dashboard. Be sure to keep on the lookout as our new website additions may arrive just in time for Christmas!

And the Story Goes...

Want to learn more about OC LAFCO's planning and regulatory authority, mandates, and resources? An opportunity to learn about the Commission's key responsibilities is coming soon to an in-person session or computer monitor near you. To make this happen, OC LAFCO staff has begun exploring content and platforms to better engage interested parties in learning all about the Commission's role in Orange County. More details on the session with the current placeholder title of "OC LAFCO 101" will be provided by early Spring. Don't miss out by staying in touch on this opportunity through our website at www.oclafco.org or contacting the OC LAFCO office at (714) 640-5100.

Unincorporated Area Profiles Get a New Look

A key resource for cities interested in exploring potential annexation of an unincorporated area within their sphere of influence is the area profile. Unincorporated area profiles were developed by OC LAFCO to assist in collaborative discussions involving cities, the County, and OC LAFCO on annexation. The profiles include

demographic and financial information for each of the County's 23 remaining unincorporated areas. Through the Commission's contractual arrangement with the Center for Demographic Research (CDR) at Cal State Fullerton, the demographics include the area population, land use, and current municipal service providers. The profile's financial data is provided by the County of Orange. Additionally, profiles for the County's disadvantaged unincorporated areas and South Orange County are currently under development. The agency website will become home to all profiles in part to completion of the new website improvements. Cities or residents interested in exploring annexation or learning more about unincorporated areas may visit us at oclafco.org/how/county-unincorporated-areas or call the OC LAFCO office.



Mission in
San Juan
Capistrano

Agency Spotlight

Long and busy days seem to be the norm for IRWD's General Manager Paul Cook as he promptly arrived on screen for a late afternoon web chat with Executive Officer Carolyn Emery. With the expected eagerness of a 30-year water professional to dialogue about water, Paul jumped right in with his perspectives on the state of water affairs, experiences with OC LAFCO, and added excitement in speaking about the District. Read on to learn more about the exchange.

As General Manager of the largest retail water purveyor in Orange County and the eighth largest in the State, how would you generally characterize the state of water affairs today in California?

Cook: California water agencies have done a good job at providing and ensuring the delivery of reliable, safe, and affordable water to residents throughout the State. However, events such as climate change and communicating to the public the importance of being more efficient and the costs and efforts that go into providing water service have had some impacts on that. I believe water agencies need to proactively respond to these events. We also need to design systems to account for California's drier and wetter years and act on diversifying supply opportunities, such as recycled water. Acting with urgency now is key.

With that, how important is the role of cities and special districts, as not-for-profit public agencies, in providing a critical resource such as water to the public?

Cook: As public agencies that provide water service, cities and special districts play an important role. We are public stewards whose mission is to serve the people. This means not treating water as a commodity but rather facilitating the provision of a very important and limited resource to the public.

Over the past several years, IRWD has been involved in numerous annexations, reorganizations and five district consolidations. Can you share as General Manager, generally, what were the goals of the District when these efforts were undertaken, in particular consolidation, as that's a complex and can be a contentious process as well?

Cook: With each consolidation that IRWD undertook, it is important to note that the District was approached by other districts seeking potential consolidation with IRWD to enhance current areas for their customers. IRWD's standard response when approached



Michelson
Water
Recycling Plant

about consolidation or other complex boundary changes is to encourage agencies to engage interest from others through a request for proposals process, through which their expectations can be communicated in a transparent manner. Specifically, our goals of engagement include not taking on opportunities that would put our existing customers at a disadvantage, evaluating potential consolidation from the lens of what would be mutually beneficial to the customers of IRWD and current customers of the other agency, fiscal prudence, and addressing and responding to the unknowns of all affected parties and customers. In short, IRWD's goals in working through past and future consolidations or annexations to the District are to facilitate an increase in services, lower rates, improved operations, better efficiencies and robust community outreach.

Given you have been through multiple LAFCO processes that have included working with staff and interaction with the Commission, can you share general but candid perspectives regarding LAFCO's role, both locally and statewide?

Cook: LAFCO's role is very important. From IRWD's experience, OC LAFCO creates a forum for the conducting of an impartial analysis by the Commission to ensure the most efficient provision of municipal services by a local agency. As an objective party, OC LAFCO conducts this data-driven responsibility in a transparent manner that provides a platform for agency and public input and collaboration.

Your agency has also experienced multiple MSR processes, and another one for the District is on the horizon. What has been your experience with this process, and do you believe MSRs bring value to our agencies and the public? How can OC LAFCO improve the process?

Cook: MSRs are valuable and provide an opportunity for OC LAFCO to check in with agencies on how they are delivering services to residents and customers. MSRs allow OC LAFCO to conduct this process in an objective and transparent manner driven by data collected from the agencies. Other outlets for a process like this are just not out there. So, if not LAFCO, then who could facilitate this process and service to the public?

As for improving the process, one area is for OC LAFCO to set and communicate clearer timelines for the MSR process, establish expectations and address the unknowns of the process with agencies and other interested parties, and identify methods to promote understanding and purpose of MSRs.

In your leadership role as General Manager of IRWD, what are you most proud of?

Cook: IRWD has a legacy of strong systems, innovation, and collaboration, and I am most proud of our 95 percent water resiliency, diversified water supply, environmental stewardship, and the efficiency of our customers. The District has the lowest water rates in Orange County and ranks high in customer satisfaction and all of this was accomplished by the great team of people at IRWD.

General
Manager
Paul Cook



Paul Cook has been with IRWD since 2004, first serving as Assistant General Manager then as General Manager starting in 2011. A registered civil engineer, Paul has over 30 years with water and wastewater systems, and as the District's General Manager is responsible for the implementation of board policies and decision-making and supervision of the day-to-day operations and staff. With its headquarters located in the City of Irvine, IRWD provides retail water and sewer service to nearly 600,000 customers across multiple cities in Central Orange County.

REFLECTIONS FROM

Chair Doug Davert



I began my tenure as the Commission Chair in 2021 after serving in the Vice Chair role during two prior years.

At that time, being in its second year of existence, COVID-19 was a frequently used reference, and like other

local governments, OC LAFCO was required to respond and adapt to its circumstances. This included conducting our regular meetings by teleconference, closure of our offices at times with staff working remotely, and some project applications were placed on a temporary pause. However, as the second year of my tenure began, things began to transition to a new normal, and as an organization, we charged forward. In 2022, we reevaluated our core objectives by refreshing the agency's mission statement and adopted a Three-Year Strategic Plan. The Plan, which is through 2025, includes a robust work

plan that contains key goals focused on making OC LAFCO more effective and efficient. This includes succession planning, proactive legislative engagement, enhancing communication with our stakeholders, and improving our process for conducting municipal service reviews. Each area is intended to support the maintaining of sufficient staffing and resources to meet the Commission's responsibilities and requirements.

As I near the end of my Chairmanship with OC LAFCO, I am proud of the many accomplishments of this Commission and staff, including establishing an interactive website that is the gateway to OC LAFCO information and resources for our local agencies and Orange County communities and completing MSRs and approving boundary changes that support logical boundaries and enhance service delivery in our County. I'd like to personally thank the Commission for its confidence in my leadership over the past two years and look forward to continuing to work with the board and staff on the projects and activities in OC LAFCO's future.

For questions on this publication, you may contact the OC LAFCO office at **714.640.5100**.
We invite you to also visit our website at **oclafco.org**.