



Proposed FY 24-25 Budget and Work Plan

Considered April 18, 2024

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ABOUT US

Commissioners

Chair: Marshall Ochylski, Special District Member

Vice Chair: Steve Gregory, City Member

Debbie Arnold, County Member

Jimmy Paulding, County Member

Robert Enns, Special District Member

Ed Waage, City Member

Heather Jensen, Public Member

Alternates

Carla Wixom, City Member

Dawn Ortiz-Legg, County Member

Ed Eby, Special District Member

David Watson, Public Member

Staff

Rob Fitzroy, Executive Officer

Imelda Marquez-Vawter, Analyst

Morgan Bing, Clerk Analyst

Brian Pierik, Legal Counsel

Introduction

This document represents the Fiscal Year 2024-2025 Budget and Work Plan for the San Luis Obispo Location Agency Formation Commission.

Mission

Our mission is to serve the residents of San Luis Obispo County and the State of California by discouraging urban sprawl and encouraging the orderly formation and development of local agencies based upon local conditions and circumstances.

Goals

LAFCO's goals are to:

- Serve the Commission, Cities, Districts, the County, and the public by providing accurate, objective, clear, and well-organized information for decision making purposes
- Process proposal applications efficiently; consistent with the Cortese-Knox-Hertzberg Act, Local Policies and Procedures, CEQA and other applicable state laws
- Prepare Sphere of Influence/Municipal Service Review updates as necessary, while working on applications and other work efforts simultaneously
- Provide the Commission with regular status reports regarding upcoming proposals, Sphere of Influence Updates, Legislative Activities, and the Budget
- Participate in CALAFCO events to improve Commission and Staff expertise
- Inform the Commission and Public regarding various local governance issues and processes by providing regular status reports and study sessions
- Monitor the new legislation that may affect LAFCO

Priorities

Our workload prioritization is as follows:

1. Process proposal applications as mandated by statute and conduct critical operations necessary for organization to function.
2. Prepare Municipal Service Reviews every five years, as mandated by statute, based on the date a Municipal Service Review was last updated.
3. Execute special work efforts as directed by the Commission.

WORK PLAN

Project	Latest MSR Adopted	MSR Update Due Date	Status
Application Processing	N/A	N/A	Ongoing, Highest Priority
Commission Initiatives	N/A	NA	In Progress, Financial Audit - ETA 2024
Los Osos CSD MSR	Aug-14	Aug-19	In Progress, ETA 2024
San Simeon CSD MSR	Aug-14	Aug-19	In Progress, ETA 2024 (pending dissolution)
Cambria Healthcare District MSR	Aug-14	Aug-19	In Progress, ETA 2024
City of Paso Robles MSR	Feb-13	Feb-18	In Progress, ETA 2025
Coastal San Luis Resource Conservation District (RCD) MSR	Nov-14	Nov-19	Initiate 2024, ETA 2024
Upper Salinas/Las Tablas RCD MSR	Nov-14	Nov-19	Initiate 2024, ETA 2024
Santa Margarita Fire District	Nov-14	Nov-19	Initiate 2024, ETA 2025
Garden Farms Water District	Nov-14	Nov-19	Initiate 2024, ETA 2025
Port San Luis Harbor District	Nov-14	Nov-19	Initiate 2024, ETA 2025
Cayucos Sanitary District	Jan-15	Jan-20	Initiate 2025, ETA 2025
Cal Valley CSD MSR	Dec-15	Dec-20	Initiate 2025, ETA 2025
Independence Ranch CSD MSR	Dec-15	Dec-20	Initiate 2025, ETA 2025
Linne CSD MSR	Dec-15	Dec-20	Initiate 2025, ETA 2025
Squire Canyon CSD MSR	Dec-15	Dec-20	Initiate 2025, ETA 2025
Ground Squirrel Hollow CSD MSR	Dec-15	Dec-20	Initiate 2025, ETA 2026
City of San Luis Obispo MSR	Oct-16	Oct-21	Initiate 2025, ETA 2026
Shandon-San Juan Water District MSR	Oct-16	Oct-21	Initiate 2025, ETA 2026
City of Morro Bay MSR	Mar-17	Mar-22	Initiate 2025, ETA 2026
Estrella-El Pomar-Creston Water District MSR	Apr-17	Apr-22	Initiate 2026, ETA 2026
County Service Area 1 - and Nipomo Lighting District MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 7 - Oak Shore MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 9 - Los Osos MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 10 - Cayucos MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 12 - Lopez Water MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 16 - Shandon MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 18 - SLO Country Club MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 21 - Countywide Roads MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 22 - Airport Area MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
County Service Area 23 - Santa Margarita MSR	Aug-17	Aug-22	Initiate 2026, ETA 2026
Adelaida Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Arroyo Grande Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Atascadero Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Cambria Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Cayucos-Morro Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Pleasant Valley Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Paso Robles Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
San Miguel Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Santa Margarita Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Shandon Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Templeton Cemetery District MSR	Mar-18	Mar-23	Initiate 2027, ETA 2027
Nipomo CSD MSR	May-18	May-23	Initiate 2027, ETA 2027
City of Pismo Beach MSR	Sep-19	Sep-24	Up to Date
City of Atascadero MSR	Nov-19	Nov-24	Up to Date
City of Arroyo Grande MSR	Jul-20	Jul-25	Up to Date
City of Grover Beach	Jul-20	Jul-25	Up to Date
South County Sanitation District	Jul-20	Jul-25	Up to Date
Oceano CSD	Jul-20	Jul-25	Up to Date
Heritage Ranch CSD MSR	May-23	May-28	Up to Date
Templeton Community Services District (CSD) MSR	Nov-13	Nov-18	Up to Date
Avila Beach CSD MSR	Aug-23	Aug-19	Up to Date
Cambria CSD MSR	Aug-14	Aug-19	Up to Date
San Miguel CSD MSR	Nov-13	Nov-18	Up to Date

SLO LAFCO
FY 24-25 Budget & Work Plan

BUDGET

	Adopted FY 23-24	Projected Year End FY 23-24	Proposed FY 24-25	Increase / Decrease From FY 23-24
Expenditures Summary	\$711,653	\$691,037	\$727,856	2%
Revenues Summary	\$711,653	\$691,037	\$727,856	2%
<i>Services and Supplies Expenditure Details</i>				
Computer Software	\$500	\$456	\$1,000	100%
Copying-Printing	\$300	\$11	\$300	0%
Commission Meeting Expenses	\$600	\$600	\$600	0%
LAFCO Insurance Policies	\$20,000	\$18,675	\$20,000	0%
Maintenance-Equipment	\$30	\$125	\$300	900%
Maintenance-Software	\$50	\$50	\$500	900%
CALAFCO/ SDRMA / Other Memberships	\$8,800	\$7,223	\$9,000	2%
Employee Mileage Reimbursement	\$200	\$200	\$200	0%
Commissioner Mileage Reimbursement	\$1,500	\$800	\$1,500	0%
Office Supplies	\$2,500	\$1,200	\$2,500	0%
Custodial Services	\$1,800	\$1,800	\$1,800	0%
County Auditor Services	\$9,619	\$9,619	\$10,000	4%
Legal Counsel	\$32,400	\$32,400	\$33,600	4%
Postage	\$1,000	\$500	\$1,000	0%
General / Commissioner Stipends	\$39,000	\$27,674	\$15,000	-62%
Publication & Legal Notices	\$1,000	\$500	\$1,000	0%
Training	\$5,000	\$4,000	\$5,000	0%
Office Lease	\$42,000	\$42,000	\$42,000	0%
Large Equipment	\$1,500	\$1,500	\$2,000	33%
Small Equipment	\$400	\$400	\$600	50%
Telephone / Internet	\$3,000	\$3,000	\$3,000	0%
Travel Expenses	\$2,500	\$1,700	\$3,000	20%
IT Support	\$850	\$0	\$850	0%
Vehicle Allowance	\$5,400	\$0	\$5,400	0%
Vehicle Rental	\$500	\$5,400	\$500	0%
<i>Services/ Supplies Subtotal</i>	<i>\$180,449</i>	<i>\$159,833</i>	<i>\$160,650</i>	<i>-11%</i>
<i>Salary, Benefits and Taxes Expenditures</i>				
Salaries	\$326,000	\$326,000	\$342,000	5%
Federal Taxes - FICA Social Security	\$20,212	\$20,212	\$21,204	5%
Federal Taxes - Medicare	\$4,727	\$4,727	\$4,959	5%
SLOCPT Pension Rate	\$102,882	\$102,882	\$112,440	9%
SLOCPT Pension Obligation Bond	\$17,882	\$17,882	\$19,303	8%
SDI/SUI Employer Contribution	\$1,500	\$1,500	\$1,500	0%
Health Insurance	\$48,000	\$48,000	\$55,800	16%
Deferred Compensation	\$10,000	\$10,000	\$10,000	0%
<i>Salary, Benefits and Taxes Subtotal</i>	<i>\$531,204</i>	<i>\$531,204</i>	<i>\$567,206</i>	<i>7%</i>
Total Expenditures	\$711,653	\$691,037	\$727,856	2%
<i>Revenues</i>				
Interest Earned	\$4,000	\$8,884	\$9,000	125%
Environmental Review Fees	\$3,000	\$3,500	\$3,000	0%
Sphere of Influence Fees	\$2,000	\$6,000	\$3,000	50%
Application Processing Fees	\$23,000	\$23,000	\$24,000	4%
Other Revenue (Transfer of Reserves)	\$60,000	\$30,000	\$30,000	-50%
<i>Agency Contributions</i>				
Cities	\$206,551	\$206,551	\$219,619	6%
County	\$206,551	\$206,551	\$219,619	6%
Special Districts	\$206,551	\$206,551	\$219,619	6%
Total Revenue	\$711,653	\$691,037	\$727,856	2%
Reserves Fund Balance	\$220,419	\$250,419	\$220,419	0%