



# San Luis Obispo Local Agency Formation Commission

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BRIAN A. PIERIK  
Legal Counsel

**TO: MEMBERS OF THE COMMISSION**

**FROM: ROB FITZROY, EXECUTIVE OFFICER**

**DATE: AUGUST 15, 2024**

**SUBJECT: BUDGET ADJUSTMENT TO FISCAL YEAR 2024-2025 BUDGET AND ORGANIZATIONAL ADJUSTMENT**

## RECOMMENDATION

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It is recommended that the Commission consider taking the following action:

**Action:** Motion to adopt Resolution approving a Fiscal Year (FY) 24-25 budget adjustment and position modifications.

## OVERVIEW

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LAFCO currently has three (3) full time equivalent (FTE) positions, including an Executive Officer, Analyst, and Clerk Analyst, and a contract Legal Counsel. Over the last several years, there has been a consistent rise in the number of proposal applications and the complexity of the proposals continues to increase as well.

Beginning in 2021, we took a conservative approach and sought to avoid adding additional staff resources by improving various aspects of the existing organization to address the workload issue. With the Commission's support, the Executive Officer was able to implement several organizational improvements including but not limited to application processing improvements, improved budget and annual work plan implementation, website overhaul, application packet overhaul, software upgrades, and project management training/software.

In addition, in 2021, the Commission approved the conversion of the previously held "Commission Clerk" position to a "Clerk Analyst" position to increase capacity for analyst-oriented workload. All of these efforts have produced positive results, and the current staffing team operates at a high level and produces high quality deliverables.

However, despite these efforts, workload demand has outpaced staff resources available, and we continue to fall behind on some work efforts, primarily the

Municipal Service Review (MSR) work program. As such, in order to maintain our legislative responsibilities for application processing and timely delivery of Municipal Service Reviews (MSR) and other critical responsibilities, additional resources and organizational changes are proposed as follows.

It is proposed to add a .75 FTE Commission Clerk position and convert the existing Clerk Analyst position to an Analyst position. This will build workload capacity by allowing the newly converted Analyst position to focus solely on analyst functions (application processing and MSRs) and transfer all Clerk functions to the newly created Commission Clerk position. The Commission Clerk position will be responsible for all typical Clerk functions, including the facilitation of Commission meetings, noticing, external communications, administrative functions such as payroll, response to Public Records Act requests, invoicing, and providing support as needed to the Executive Officer and Analysts.

### **FISCAL CONSIDERATIONS**

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There are no costs associated with converting the existing Clerk Analyst position to an Analyst position. The rate for the .75 FTE Commission Clerk would range from \$28-\$32 per hour depending on experience, plus .75 of the benefits offered to full-time employees. It is anticipated the position would require 1,560 hours per year or approximately 30 hours per week. Assuming full utilization and at the top hourly rate, FY 24-25 would result in an additional expenditure of approximately \$44,000 for the remainder of the fiscal year, which includes benefits and taxes. This assumes that a new employee would be onboarded around January, which is halfway through the current fiscal year. For FY 25-26, assuming full utilization at the top rate it would result in an expenditure of approximately \$88,000, which includes benefits and taxes. The maximum base salary would be \$50,000. Future expenditures would be built into future budgets beginning with FY 25-26.

For expenditures in FY 24-25, it is proposed to utilize fund balance reserves in the amount of \$44,000. Currently, the fund balance of reserves available is \$300,873.

<b>FY 24-25 Expenditure</b>	<b>FY 25-26 Expenditure</b>
\$44,000 including benefits and taxes	\$88,000 including benefits and taxes

### **NEXT STEPS**

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If approved, staff would initiate a recruitment for the .75 FTE Commission Clerk position and the existing Clerk Analyst will be converted to an Analyst position. It is anticipated that a recruitment period for the Commission Clerk position would run through September and October. Interviews would be conducted in November, and an expected start date of approximately January 2025.

## **ATTACHMENTS**

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**Attachment A:** Draft LAFCO Resolution No. 2024-\_\_\_ Approving Budget Adjustment

# **Attachment A**

Draft LAFCO Resolution No.  
2024-\_\_\_ Approving Budget  
Adjustment

**IN THE LOCAL AGENCY FORMATION COMMISSION**  
**COUNTY OF SAN LUIS OBISPO, STATE OF CALIFORNIA**

Thursday, August 15, 2024

**RESOLUTION NO. 2024-\_\_\_**

**RESOLUTION APPROVING A FISCAL YEAR 24-25 BUDGET ADJUSTMENT  
AND POSITION ADDITION**

The following resolution is now offered:

**RECITALS**

**WHEREAS**, this matter was set for a public meeting at 9:00 a.m. on August 15, 2024, and staff reports were prepared and made available, and the meeting was conducted as required by law; and

**WHEREAS**, at said meeting, this Commission heard and received any written protests, objections, and evidence which were made, presented, or filed, and all persons present were given the opportunity to hear and be heard in respect to any matter relating to the budget and work plan; and

**WHEREAS**, the Commission has identified a need for additional staffing resources to meet workload demands; and

**WHEREAS**, the Commission intends to change the existing Clerk Analyst position to an Analyst position, and add a .75 Full Time Equivalent (FTE) Commission Clerk position so that the organization has a total of four positions including an Executive Officer, two Analysts, and a .75 FTE Commission Clerk.

**WHEREAS**, in order to fund the .75 FTE Commission Clerk position a budget augmentation to the approved Fiscal Year 24-25 is necessary to increase expenditure limits by \$44,000, and future expenditures will be budgeted accordingly in future budget cycles.

**NOW, THEREFORE, BE IT RESOLVED AND ORDERED** by the Local Agency Formation Commission of the County of San Luis Obispo, State of California, as follows:

1. That the Recitals set forth hereinabove are true, correct, and valid and are hereby incorporated by this reference.
2. That a budget augmentation expenditure increase of \$44,000 shall be made to the FY 24-25 budget.
3. That the organization adds a .75 FTE Commission Clerk and converts the existing Clerk Analyst position to an Analyst position.

Upon a motion of Commissioner \_\_\_\_\_, seconded by Commissioner \_\_\_\_\_, and on the following roll call vote:

AYES:

NAYS:

ABSENT:

ABSTAIN:

\_\_\_\_\_  
Marshall Ochylski, Chairperson      Date  
Local Agency Formation Commission

**ATTEST:**

\_\_\_\_\_  
Rob Fitzroy      Date  
LAFCO Executive Officer

**APPROVED AS TO FORM AND LEGAL EFFECT:**

\_\_\_\_\_  
Brian Pierik      Date  
LAFCO Legal Counsel