

YOLO LAFCo

PROJECT POLICIES

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YOLO LAFCO

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1.0 GENERAL PROVISIONS

1.1 TITLE

The Yolo County Local Agency Formation Commission (“LAFCo” or “Commission”) hereby adopts the following Project Policies governing common applications and LAFCo studies considered by the Commission. These policies supersede those previously adopted, shall apply to LAFCo and are adopted pursuant to the authority vested in the Commission by the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000, Government Code Section 56000, et seq. (“CKH Act”). These policies shall guide the decision-making of the LAFCo Executive Officer and the Commission.

2.0 STANDARDS OF EVALUATION FOR PROPOSALS FOR A CHANGE OF ORGANIZATION OR REORGANIZATION

The following standards are adopted for the evaluation of proposals for a change of organization or reorganization of local agencies.

2.1 CHOICE OF ENTITY

The provision of municipal services in highly urbanized areas by cities rather than by counties or special districts is favored. The further development of single purpose autonomous districts is disfavored. The formation of multi-purpose special districts contiguous to existing cities is disfavored. The creation of a multiplicity of small cities is disfavored. Accommodating additional growth within, or through the expansion of, the boundaries of those local agencies which can best accommodate and provide necessary governmental services and housing for persons and families of all incomes in the most efficient manner feasible is favored.

2.2 DUPLICATION OF AUTHORITY

The inclusion of territory within a city in one or more districts with common powers, or within two or more districts with common powers, is disfavored. The Commission shall determine whether an application violates the policy set forth in the preceding sentence. If the determination is in the affirmative, the Commission shall provide each affected city or district an opportunity to express its views to the Commission.

2.3 TERRITORY TO BE INCLUDED

The division of existing identifiable communities is disfavored, but at the same time the inclusion of heterogeneous economic and social interests within the same entity is favored. The division of existing communities identifiable on the basis of appreciable social, economic, or other factors is disfavored. The division of existing commercial districts is disfavored. The inclusion of contiguous or nearby urban areas within the same entity is favored. The inclusion of separate existing contiguous or nearby communities identifiable on the basis of appreciable, social, economic, or other factors is favored. Consistency with current spheres of influence is favored. Conformity with appropriate city or county general and specific plans is favored. The location of boundary lines of areas proposed for annexation to cities or districts so as to promote productivity and preservation of agricultural land is favored. Proposals which result in significant or serious operational or economic problems or disruptions of existing services in remaining adjacent territory are disfavored.

2.4 ECONOMIC FEASIBILITY OF PROPOSED FORMATIONS

If the proposal is for the formation of a new agency, the proponents shall demonstrate the economic feasibility of the proposed formation, taking into account both the assessed valuation of the subject territory and any other sources of revenue, compared to the type and cost of the services proposed to be provided. Any economic feasibility study shall include and address the following considerations:

- a) Infrastructure needs or deficiencies;
- b) Growth and population projections for the affected area;
- c) Financing constraints and opportunities;
- d) Cost avoidance opportunities;
- e) Opportunities for rate restructuring;
- f) Opportunities for shared facilities;
- g) Government structure options, including advantages and disadvantages of consolidation or reorganization of service providers;
- h) Evaluation of management efficiencies; and
- i) Local accountability and governance.

A proposal for the formation of a new agency shall also be accompanied by an analysis of the availability and economic feasibility of obtaining the proposed services from other private and public agencies.

2.5 FUTURE SERVICE

In evaluating a proposal, the Commission shall consider not only present service needs of the area under consideration, but shall also consider future services which may be required to take care of future growth or expansion. If a proposal is submitted to extend services into a previously unserved unincorporated area or to create a new service provider with the power or authority to extend services to urban type development in a previously unserved unincorporated area, the Commission will review the proposal to ensure that it is consistent with the policies set forth in State law and LAFCo policies.

2.6 DESCRIPTION, SERVICE PLAN, AND TIMETABLE REQUIRED

Any proposal to annex shall be accompanied by a service plan that describes the extension and financing of services and timing of major milestones of any related development project.

2.7 TERMS AND CONDITIONS

Any term or condition recommended for the Commission to impose pursuant to Government Code §56885.5 et seq. must be presented by a statement in writing that includes a description of each proposed term and condition. If the term or condition is proposed by an affected public agency, the statement in writing must be signed by the chief legislative or administrative officer of the agency. If the term or condition is proposed by a proponent, it must be signed by one of the proponents. In the absence of protest, the Commission shall evaluate the proposed terms and conditions on the basis of the written statement. In the case of a protest that is not resolved at the public hearing, the Commission may direct the Executive Officer to negotiate with the opposing parties and may also authorize independent evaluation of issues involved in the dispute.

2.8 BOUNDARIES

Boundary descriptions of territory included in any proposal shall be definite and certain. If the Commission determines that the boundary is indefinite or uncertain, it shall refer the proposal back to the proponents and require the proponents to submit a reviewed boundary description at the public hearing which is certified by the County Surveyor as being definite and certain. If the Commission requires the inclusion of territory in addition to that proposed in an application, it may direct the County Surveyor to prepare a new boundary description.

Boundaries that split lines of assessment or legal parcel boundaries are disfavored. Boundaries which follow existing political boundaries and natural or manmade features such as rivers, lakes, railroad tracks, roads and freeways are favored. Boundaries which create islands, strips, or corridors are disfavored. Boundary lines of areas proposed for annexation to cities or districts, which include, where possible, land abutting both sides of a given street or right of way within the same entity are favored. When a boundary must follow a street or highway, the boundary will include the complete right of way for the entire street or highway.

2.9 PRE-ZONING

Any proposal for the annexation of territory to a city shall be accompanied by the city's general plan and pre-zoning for that territory, including the planned and probable use of the territory based upon the general plan and pre-zoning designations.

2.10 REGIONAL HOUSING

LAFCo encourages all pertinent agencies, both public and private, to collaborate on effective solutions to introduce more affordable housing into the County, including more housing for farm workers.

A proposal's effect on a city or cities and the County's ability to achieve their respective fair shares of the regional housing needs as determined by the Sacramento Area Council of Governments ("SACOG") shall be considered. In such consideration, the Commission shall review all relevant information presented to it, including but not be limited to, the following:

- a) The agency's regional housing needs allocation as determined by SACOG;
- b) Whether the affected agency has recently updated (within five years) the housing element of its general plan;
- c) Whether the affected agency has a certified housing element in its general plan;
- d) Whether the agency has an inclusionary housing ordinance that meets the minimum standard of the SACOG Affordable Housing Compact;
- e) The degree to which the agency has zoned adequate amounts and quality of land for housing;
- f) The degree to which development within the agency has met that agency's its "low income" and "very low income" housing targets as determined by SACOG;

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- g) Whether an agency had recently changed the affected territory's zoning from residential to a non-residential use; and
 - h) The extent to which the territory to be annexed will advance, or inhibit, the principles, goals, objectives, policies, and standards of the agency's housing element, including
 - i) Whether the territory to be annexed to a city will reduce another jurisdiction's ability to meet its housing element;
 - ii) Whether the proposal will advance or inhibit the agency's and other agencies' jobs/housing balance; and
 - iii) In cases where the territory to be annexed will be used for non-residential purposes, whether said territory was designated for housing by another agency.

2.11 WATER AND WATER AVAILABILITY

For any proposal that entails the provision of water services, the timely availability of water supplies adequate for projected needs will be evaluated as specified in Government Code §56668(l) and 65352.5. The applicant will provide information that addresses the factors set forth in Government Code §65352.5(c).

The applicant will also provide sufficient information for the Commission to determine that adequate services, facilities, and improvements can be provided and financed by the agency responsible for the provision of water services, including but not limited to:

- a) A "will serve" letter from the agency dated within six (6) months of the date of the Commission's consideration of the proposal; or
- b) An agreement between the developer and the agency sufficient for the agency to provide water services.

In evaluating the annexing agency's capacity to provide water, the Commission shall take into account the agency's ability to acquire the resources necessary to provide this service, including but not limited to securing water rights.

Annexation to an agency that has a cease and desist order, water connection moratorium, or similar service limitation preventing it or directing it not to issue additional water connections is disfavored.

The Commission may waive any of the foregoing requirements on a case-by-case basis if it determines there is a public health or safety threat that justifies the extension of water service.

2.12 ENVIRONMENTAL JUSTICE

The extent to which the proposal will promote environmental justice shall be considered. As used in this subdivision, “environmental justice” means the fair treatment of people of all races, cultures, and incomes with respect to the location of public facilities and the provision of public services.

2.13 PROPERTY TAX TRANSFER NEGOTIATIONS

Property tax exchange negotiations must be completed and filed with the Executive Officer before a Certificate of Filing may be issued.

2.14 USE OF STANDARDS

In the evaluation of a proposal, the Commission shall consider these Standards for Evaluation, the Agricultural Conservation Policy, the Land Evaluation and Site Assessment model, any applicable sphere of influence, and any other criteria and requirements as may be adopted by the Commission from time-to-time, the requirements and criteria set forth in the Local Government Reorganization Act of 2000 (as it may be amended from time-to-time), including but not limited to Government Code § 56668, any relevant information concerning the proposal, the environmental review document, the Executive Officer's report, presentations of all interested parties at the public hearing, and any other relevant information as may be submitted to the Commission in connection with its consideration of the proposal.

3.0 OUT OF AGENCY SERVICE REVIEW

3.1 APPLICABILITY

Government Code § 56133 requires that districts and cities obtain LAFCo approval of any new or extended services outside the agency’s existing boundaries. For the Commission to approve the request, the area to be served must be within the sphere of influence (“SOI”) of the agency, and annexation of the territory is anticipated. LAFCo may also authorize extended services outside an agency’s SOI to respond to an existing or impending public health or safety threat (e.g. failing well or septic system).

The following services are exempt from this code section:

- a) Contracts or agreements solely involving two or more public agencies where the public service to be provided is an alternative to, or substitute for, public services already being provided by an existing public service provider and where the level of service to

be provided is consistent with the level of service contemplated by the existing service provider.

- b) Contracts for the transfer of nonpotable or nontreated water.
- c) Contracts or agreements solely involving the provision of surplus water to agricultural lands and facilities, including, but not limited to, incidental residential structures, for projects that serve conservation purposes or that directly support agricultural industries. Approval from the Commission is required before any surplus water is provided to a project that will support or induce development.
- d) Service that a city or district was providing on or before January 1, 2001.
- e) A local publicly owned electric utility, as defined by Section 9604 of the Public Utilities Code, providing electric services that do not involve the acquisition, construction, or installation of electric distribution facilities by the local publicly owned electric utility, outside of the utility's jurisdictional boundaries.

LAFCo approval of out-of-agency agreements is a discretionary action under the California Environmental Quality Act (CEQA).

3.2 INITIATION OF PROCESS

Government Code § 56133 specifies that a city or special district must apply for and obtain LAFCo approval before providing new or extended services outside its jurisdictional boundaries. Initiation of the process can also be made by application from the prospective recipient of the services with agreement of the agency. *See Community Water Coalition v. Santa Cruz County LAFCo*, 200 Cal. App. 4th 1317 (2011).

3.3 STANDARDS OF EVALUATION

LAFCo will consider the following factors to determine the local and regional impacts of proposed out of agency services:

- a) Whether annexation is a reasonable and preferable alternative to LAFCo allowing extended services outside the agency's jurisdictional boundaries;
- b) The growth inducing impacts of any proposal;
- c) Whether the proposed extension of services promotes logical and orderly development of areas within the SOI (i.e. islands, strips and corridors are disfavored);

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- d) The agreed upon timetable and stated expectation for annexation to the agency providing the requested service;
 - e) The proposal's consistency with the policies and plans of all affected agencies;
 - f) The ability of the local agency to provide service to the proposed area without detracting from current service levels;
 - g) Whether the proposal contributes to the premature conversion of agricultural land or other open space land;
 - h) Whether the proposal conflicts with or undermines adopted Municipal Service Review determinations and/or recommendations; and
 - i) Other factors determined to be relevant by the Commission or staff.

3.4 EXPIRATION OF APPROVAL

LAFCo's authorization for extended services shall generally be valid up to one year from the date of approval and will expire unless a contract has been executed and construction commenced. If the extended services are part of an overall development proposal, the authorization shall generally be valid per the term specified by the lead agency project approvals, unless otherwise specified in the LAFCo conditions of approval.

3.5 EMERGENCY CONNECTIONS

In circumstances presenting an imminent peril to the public health and safety (e.g. a failing well or septic system), the Executive Officer will review the request immediately and depending on the specific nature of the problem and need for immediate action either issue a temporary approval, or defer the matter to the Commission's next meeting. If the Executive Officer gives temporary approval such approval shall only be in effect until the Commission's decision. LAFCo acknowledges that the Standards of Evaluation will not apply to emergency connections in most cases.

3.6 DEFINITIONS

NEW OR EXTENDED SERVICES - In determining whether out of agency services are considered "new or extended", LAFCo defines "new or extended" in terms of geographical area/territory. If a specific service (e.g. water or sewer) has been authorized outside agency boundaries to a specified territory (either by grandfathered status prior to January 1, 2001 or by subsequent LAFCo approval) a new contract for the same type of service within the same territory does not require additional LAFCo review.

4.0 AGRICULTURAL CONSERVATION

4.1 LEGISLATIVE MANDATE

California Government Code § 56377 mandates LAFCO consider the following factors. In reviewing and approving or disapproving proposals which could reasonably be expected to induce, facilitate, or lead to the conversion of existing open-space lands to uses other than open-space uses, the commission shall consider all of the following policies and priorities:

- a) Development or use of land for other than open-space uses shall be guided away from existing prime agricultural lands in open-space use toward areas containing non-prime agricultural lands, unless that action would not promote the planned, orderly, efficient development of an area.
- b) Development of existing vacant or non-prime agricultural lands for urban uses within the existing jurisdiction of a local agency or within the sphere of influence of a local agency should be encouraged before any proposal is approved which would allow for or lead to the development of existing open-space lands for non-open-space uses which are outside of the existing jurisdiction of the local agency or outside of the existing sphere of influence of the local agency.

4.2 APPLICABILITY

Given the direction outlined by the California Legislature in Government Code § 56377, LAFCo adopts the following policies in respect to the conversion of agricultural land to urban uses. This policy is meant to apply both to city and special district changes of organization when urban development is the ultimate goal.

Unless otherwise provided in this Policy, the provisions of this Policy shall apply to all proposals requiring approval by the Commission, including but not limited to, any proposal for approval of a change of organization, reorganization, or out-of-agency service agreement.

This Policy applies to proposals of both public agencies and private parties. However, LAFCo recognizes that there are significant differences between public agencies and private parties. In light of those differences, in some circumstances it may not be appropriate to require mitigation for the loss of prime agricultural land as would otherwise be required by this Policy.

A fundamental difference is that public agencies are generally responsible to the electorate, while private parties are not. Public agencies are also generally required to provide constitutionally or statutorily mandated services. In addition, a public agency is generally

required, by law or policy considerations, to locate its facilities within its boundaries, while a private party has no such constraints.

Public agencies are also generally subject to constitutional or statutory constraints on their ability to raise revenues. Public agencies often experience increases in demand for services that are not (and often cannot) be accompanied by equivalent increases in revenues. In light of these and other fiscal constraints that are currently imposed upon public agencies, a mitigation requirement could result in an additional cost to a public agency that it is unable to recoup by increasing its revenues, which in turn could impair the agency's ability to provide its constitutionally and statutorily mandated services.

In addition, unlike private parties, public agencies are often exempt from the land use controls and regulations of other public agencies, despite the fact that the activities of the former occur within the boundaries of the latter. Although a public agency might request input from other local agencies, it is not necessarily bound by or required to follow their local planning requirements. As a result, a public agency's development or construction activities may not be subject to the same degree of control as a private party, and it might not learn of a mitigation requirement until after it has completed significant portions of the planning processes that are required by law.

Based upon the foregoing factors, LAFCo concludes that, in the case of proposals that are undertaken exclusively for the benefit of a public agency, the Commission should review the applicability of the mitigation requirements set forth in this Policy on a case-by-case basis to determine the appropriateness of requiring mitigation in any particular case.

4.3 AGRICULTURAL POLICY STATEMENT

Agriculture is a vital and essential part of the Yolo County economy and environment. Agriculture shapes the way Yolo County residents and visitors view themselves and the quality of their lives. Accordingly, boundary changes for urban development should only be proposed, evaluated, and approved in a manner which, to the fullest extent feasible, is consistent with the continuing growth and vitality of agriculture within the county.

4.4 REVIEW CRITERIA

To promote the policy statement, proposals shall be reviewed based on the following considerations:

- a) Existing developed areas should be maintained and renewed;

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- b) Vacant land within developed areas should be developed before agricultural land is annexed for non-agricultural purposes;
 - c) Land substantially surrounded by existing agency boundaries should be annexed before other lands;
 - d) Urban development should be restricted in agricultural areas. For example, agricultural land should not be annexed for non-agricultural purposes when feasible alternatives exist;
 - e) The continued productivity and viability of agricultural land surrounding existing communities should be promoted, by preventing the premature conversion of agricultural land to other uses and, to the extent feasible, minimizing conflicts between agricultural and other land uses;
 - f) Development near agricultural land should not adversely affect the economic viability or constrain the lawful, responsible practices of the agricultural operations;
 - g) Where feasible, non-prime land should be annexed before prime land; and
 - h) A land's current zoning, pre-zoning, or land use designation is one of the factors the Commission will consider in determining whether mitigation will be required for the loss of agricultural land. A land's zoning, pre-zoning, or land use designation in the city's or County's general plan does not automatically exempt it from mitigation.

4.5 AGENCY GUIDELINES

LAFCo encourages local agencies to adopt policies that result in efficient, coterminous, and logical growth patterns within their general plan and sphere of influence areas and that encourage protection of prime agricultural land in a manner that is consistent with this Policy.

LAFCo encourages the maintenance of agricultural inter-city buffers between the cities. LAFCo encourages the cities and the County to formalize and strengthen existing agreements maintaining agricultural buffers.

LAFCo encourages local agencies to identify the loss of prime agricultural land as early in their processes as possible, and to work with applicants to initiate and execute plans to mitigate for that loss, in a manner that is consistent with this Policy, as soon as feasible. Local agencies may also adopt their own agricultural conservation policies, consistent with this Policy, in order to better meet their own circumstances and processes.

Detachment of prime agricultural lands and other open space lands shall be encouraged if consistent with the sphere of influence for that agency

4.6 STANDARDS FOR ANNEXATIONS INVOLVING PRIME AGRICULTURAL LAND

Annexation of prime agricultural lands shall not be approved unless the following factors have been considered:

- a) There is insufficient marketable, viable, less prime land available in the subject jurisdiction for the proposed land use;
- b) The adoption and implementation of effective measures to mitigate the loss of agricultural lands, and to preserve adjoining lands for agricultural use to prevent their premature conversion to other uses. Such measures may include, but need not be limited to: the acquisition and dedication of farmland, development rights, open space and conservation easements to permanently protect adjacent and other agricultural lands within the county; participation in other development programs (such as transfer or purchase of development rights); payments to responsible, recognized government and non-profit organizations for such purposes; the establishment of open space and similar buffers to shield agricultural operations from the effects of development; and
- c) Less prime agricultural land generally should be annexed and developed before prime land is considered for boundary changes. The relative importance of different parcels of prime agricultural land shall be evaluated based upon the following (in a descending order of importance):
 - i. Soil classification, with Class I or II soil receiving the most significance, followed by the Revised Storie Index Rating.
 - ii. The land's economic viability for continued agricultural use.

4.7 ANNEXATION OF LANDS IN AGRICULTURAL PRESERVE CONTRACT

Annexation for land uses in conflict with an existing agricultural preserve contract shall be prohibited, unless the Commission finds that it meets all the following criteria:

- a) The area is within the annexing agency's sphere of influence;
- b) The Commission makes findings required by Government Code § 56856.5.
- c) The parcel is included in an approved city specific plan;

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- d) The soil is not categorized as prime;
 - e) Mitigation for the loss of agricultural land has been secured at least at a 1:1 ratio of agricultural easements for the land lost;
 - f) There is a pending, or approved, rescission for the property that has been reviewed by the local jurisdictions and the Department of Conservation; and
 - g) Any Williamson Act Contract on the property has been non-renewed if still awaiting rescission approval.

4.8 CHANGE OF ORGANIZATION/REORGANIZATION RESULTING IN CONVERSION OF PRIME AGRICULTURAL LAND

LAFCo will approve a change of organization which will result in the conversion of prime agricultural land or open space use to other uses only if the Commission finds that the proposal will lead to planned, orderly, and efficient development. The following factors shall be considered:

- a) Contiguity of the subject land to developed urban areas;
- b) Receipt of all other discretionary approvals for changes of boundary, such as rezoning, environmental review, and service plans as required by the Executive Officer before action by the Commission. If not feasible before the Commission acts, the proposal can be made contingent upon receipt of such discretionary approvals within not more than one (1) year following LAFCo action;
- c) Consistency with existing planning documents of the affected local agencies, including a service plan of the annexing agency or affected agencies;
- d) Likelihood that all or a substantial portion of the subject land will develop within a reasonable period of time for the project's size and complexity;
- e) The availability of less prime land within the sphere of influence of the annexing agency that can be developed, and is planned and accessible, for the same or a substantially similar use; and
- f) The proposal's effect on the physical and economic viability of other agricultural operations. In making this determination, LAFCo will consider the following factors:
 - i. The agricultural significance of the subject and adjacent areas relative to other agricultural lands in the region;

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- ii. The existing use of the subject and adjacent areas;
 - iii. Whether public facilities related to the proposal would be sized or situated so as to facilitate the conversion of adjacent or nearby agricultural land, or will be extended through or adjacent to, any other agricultural lands which lie between the project site and existing facilities;
 - iv. Whether natural or man-made barriers serve to buffer adjacent or nearby agricultural land from the effects of the proposed development;
 - v. Provisions of the General Plan's open space and land use elements, applicable growth management policies, or other statutory provisions designed to protect agriculture. Such provisions may include, but not be limited to, designating land for agriculture or other open space uses on that jurisdiction's general plan, adopted growth management plan, or applicable specific plan; adopting an agricultural element to its general plan; and acquiring conservation easements on prime agricultural land to permanently protect the agricultural uses of the property; and
 - vi. The establishment of measures to ensure that the new property owners shall recognize the rights of adjacent property owners conducting agricultural operations and practices in compliance with the agricultural zone in accordance with the Right to Farm Ordinance adopted by the Yolo County Board of Supervisors.

4.9 AGRICULTURAL MITIGATION

Except as expressly noted in sections 4.13 and 4.14 below, annexation of prime agricultural lands shall not be approved unless one of the following mitigations has been instituted, at not less than a 1:1 replacement ratio:

- a) The acquisition and dedication of farmland, development rights, and agricultural conservation easements to permanently protect adjacent and other agricultural lands within the County.
- b) The payment of fees that is sufficient to fully fund the acquisition and maintenance of such farmland, development rights or easements. The per acre fees shall be specified by a Fee Schedule or Methodology, noted in Section 4.15, which may be periodically updated at the discretion of the Commission.

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- c) Any such measures must preserve prime agricultural property of reasonably equivalent quality and character that would otherwise be threatened, in the reasonably foreseeable future, by development and/or other urban uses.

The loss of fewer than twenty (20) acres of prime agricultural land generally shall be mitigated by the payment of in lieu fees as mitigation rather than the dedication of agricultural conservation easements. The loss of twenty (20) acres or more of prime agricultural land generally may be mitigated either with the payment of in lieu fees or the dedication of agricultural conservation easements. In all cases, the Commission reserves the right to review such mitigation on a case-by-case basis.

4.10 AGRICULTURAL EASEMENT REQUIREMENTS

If an applicant provides agricultural easements to satisfy this requirement, the easements must conform to the following characteristics:

- a) The land used to mitigate the loss of prime agricultural land must also be prime agricultural land as defined in this Policy and the CKH Act.
- b) In addition, it must also be of reasonably equivalent quality and character as the mitigated land as measured using both of the following methodologies:
 - i. Average Storie Index – The USDA calculation methodology will be used to calculate the average Storie Index or Revised Storie Index score. The mitigating land's average Index score shall be no more than 10% less than the mitigated land's average Index score. The decision of whether to use the Storie Index or Revised Storie Index is within LAFCo's sole discretion.
 - ii. Land Equivalency and Site Assessment ("LESA") Model – The LESA calculation shall be in accordance with the methodology adopted by this Commission (see appendices). The mitigating land's LESA score shall be no more than 10% below the mitigated land's LESA score.
- c) As a general rule, the Commission will not accept, as mitigation required by this Policy, an agricultural conservation easement or property that is "stacked" or otherwise combined with easements or property acquired for habitat conservation purposes, nor for any other purposes that are incompatible with the maintenance and preservation of economically sound and viable agricultural activities and operations. The Commission retains the discretion to make exceptions on a case-by-case basis, based upon whether the applicant made a good-faith effort to mitigate separately for the loss of habitat in

accordance with the Yolo Natural Heritage Program process but such efforts were infeasible, and whether the proposed "stacked" mitigation for the loss of prime agricultural land and habitat involves one of the following, whichever results in the greatest acreage of preserved land:

- i. Mitigation at a ratio of no less than 2:1 for the loss of prime agricultural soils; or
 - ii. Mitigation at a ratio of no less than 1:1 for the loss of all agricultural lands in the proposal area; or
 - iii. The property subject to the agricultural conservation easement is larger than the proposal area, meets the conditions specified in this Policy, and encompasses a complete field, legal parcel, or farm line.
- d) The presence of a home on land that is subject to an agricultural conservation easement is generally incompatible with the maintenance and preservation of economically sound and viable agricultural activities and operations on that land. The presence or introduction of a home may diminish the value of the agriculture conservation easement as mitigation for the loss of prime agricultural land. Consequently, an agricultural conservation easement will generally not be accepted as mitigation for the loss of prime agricultural land if the easement permits the presence of a home, except an existing home that has been present on the proposed easement for at least twenty-five (25) years, or construction of a comparable replacement for such a home. Exceptions to this section of the Policy may be granted by the Commission on a case-by-case basis if the home site is less than two acres and if the applicant can provide sufficient evidence that a home site on the agriculture conservation easement is necessary to further the goals of maintaining and preserving economically sound and viable agricultural activities and operations on that easement.

4.11 EASEMENT HOLDER

LAFCo favors the use of a local non-profit agricultural conservation entity or the regional branch of a nationally recognized non-profit agricultural conservation entity as the easement holder. The Commission will use the following criteria when approving the non-profit agricultural conservation entity for these purposes:

- a) Whether the entity is a non-profit organization that is either based locally or is a regional branch of a national non-profit organization whose principal purpose is holding and administering agricultural conservation easements for the purposes of conserving and maintaining lands in agricultural production;

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- b) Whether the entity has a long-term proven and established record for holding and administering easements for the purposes of conserving and maintaining lands in agricultural production;
 - c) Whether the entity has a history of holding and administering easements in Yolo County for the foregoing purposes;
 - d) Whether the entity has adopted the Land Trust Alliance’s “Standards and Practices” and is operating in compliance with those Standards; and
 - e) Any other information that the Commission finds relevant under the circumstances.

A local public agency may be an easement co-holder if that agency was the lead agency during the environmental review process. LAFCo also favors that applicants transfer the easement rights or in lieu fees directly to the recognized non-profit agricultural conservation entity in accordance with that entity’s procedures. The Commission retains the discretion to determine whether the agricultural conservation entity identified by the applicant and the local lead agency has met the criteria delineated above.

4.12 AGRICULTURAL MITIGATION IMPOSED BY OTHER AGENCIES

The Commission prefers that mitigation measures consistent with this Policy be in place at the time that a proposal is filed with the Commission. The loss of prime agricultural land may be mitigated before Commission action by the annexing city, or the County of Yolo in the case of a district annexation, provided that such mitigation is consistent with this Policy. LAFCo will use the following criteria in evaluating such mitigation:

- a) Whether the loss of prime agricultural land was identified during the project’s or proposal’s review process, including but not necessarily limited to review pursuant to the California Environmental Quality Act;
- b) Whether the approval of the environmental documents included a legally binding and enforceable requirement that the applicant mitigate the loss of prime agricultural land in a manner consistent with this Policy; and
- c) Whether, as part of the LAFCo application, an adopted ordinance or resolution was submitted confirming that mitigation has occurred, or requiring the applicant to have the mitigation measure in place before the issuance of a grading permit, a building permit or final map approval for the site.

4.13 MITIGATION FOR PUBLIC AGENCY PROJECTS

As noted in Section 4.2, the Commission has concluded that, in the case of proposals that are undertaken exclusively for the benefit of a public agency, the Commission should review the applicability of the mitigation requirements set forth in this Policy on a case-by-case basis to determine the appropriateness of requiring mitigation in any particular case. In making such a determination, the Commission will consider all relevant information that is brought to its attention, including but not limited to the following factors:

- a) Whether the public agency had any significant, practical option in locating its project, including locating the project on non-prime or less prime agricultural land;
- b) Whether the public agency is subject to or exempt from the land use regulations of another public agency;
- c) Whether the public agency identified the loss of agricultural land as an environmental impact during the project's review, including but not limited to California Environmental Quality Act review, and, if so, whether it adopted a "Statement of Overriding Considerations" for that impact;
- d) When the public agency learned of the agricultural conservation mitigation requirements of the Commission's Policy or that of another public agency (whether or not it was subject to that agency's land use control);
- e) Whether the public agency could reasonably have allocated or obtained sufficient revenues to provide for some or all of the mitigation required by this Policy if it had learned of that requirement before submitting its proposal to this Commission;
- f) Whether the public good served by the public agency's proposal clearly outweighs the purposes served by this Policy and its mitigation requirements; and
- g) Whether the proposal is necessary to meet the immediate needs of the public agency.

If the Commission determines that it is not appropriate to require mitigation for the loss of agricultural land resulting from a public agency's proposal, or to require less mitigation than otherwise prescribed by this Policy, it shall adopt findings, and a statement of overriding considerations if applicable, supporting that determination.

4.14 LESS THAN SIGNIFICANT AGRICULTURAL LAND LOSS

Mitigation shall not be required for the annexation of less than five (5) acres of land if the Commission finds that the land:

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- a) Scores in the fourth tier of LESA;
 - b) Is “infill” as defined in this Policy; and
 - c) Has not been used for active agriculture purposes in the previous 20 years.

4.15 AGRICULTURAL CONSERVATION POLICY PAYMENT IN LIEU FEE METHODOLOGY

In lieu of the dedication of agricultural conservation easements that would otherwise be required by the Agricultural Conservation Policy, the Commission may permit the payment of fees as set forth in this Schedule to fully fund the acquisition and maintenance of farmland, development rights or agricultural conservation easements.

No less than 35% of the average per acre price for full and unencumbered fee title price in the last five (5) unimproved land purchases plus a five percent (5%) endowment of the cost of the easement, and the payment of the estimated transaction costs associated with acquiring an easement. The purchases must be within the general vicinity of the annexing entity and of a size equal to or greater than the total acreage of prime soils within the subject territory.

Payment of the In Lieu Fee is to be made directly to an agricultural conservation entity that meets the criteria set forth in Section 4.10 of this Policy. The agricultural conservation entity receiving these funds must present to the Commission a letter stating its intention to use these funds for the acquisition of farmland, development rights or agricultural conservation easements in Yolo County whose prime soils are reasonably equivalent to the proposal area’s soils and that the location of the easements will be within the general vicinity of the annexing entity and in an area within the County of Yolo that would otherwise be threatened, in the reasonably foreseeable future, by development and/or other urban uses.

4.16 DEFINITIONS

Except where noted, the following definitions are not defined in the California Government Code Sections 56000 et seq.

AFFECTED LOCAL AGENCY - any local agency which contains, or would contain, or whose sphere of influence contains or would contain, any territory for which a change of organization is proposed or ordered, either singularly or as part of a reorganization or for which a study is to be reviewed by LAFCo (Government Code § 56014).

AGRICULTURAL LAND - areas within which the primary zoning or general plan designation is AG, AP, or AE, or any other agricultural zone.

FEASIBLE - capable of being accomplished in a successful manner within a reasonable period of time, taking into account economic, legal, social, and technological factors (Government Code § 56038.5).

INFILL LAND - property surrounded, or substantially surrounded, by urban uses or incorporated or special district boundaries.

PRIME AGRICULTURAL LAND - (Government Code § 56064) an area of land, whether a single parcel or contiguous parcels, that has not been developed for a use other than an agricultural use and which meets any of the following qualifications:

- a) Land that qualifies, if irrigated, for rating as Class I or Class II in the USDA Natural Resources Conservation Service land use capability classification, whether or not land is currently irrigated, provided that irrigation is feasible.
- b) Land that qualifies for rating 80 - 100 Storie Index rating.
- c) Land that supports livestock used for the production of food and fiber and that has an annual carrying capacity equivalent to at least one animal unit per acre as defined by the United States Department of Agriculture in the National Range and Pasture Handbook, Revision 1, December 2003.
- d) Land planted with fruit or nut-bearing trees, vines, bushes, or crops that have a nonbearing period of less than five years and that will return during the commercial bearing period on an annual basis from the production of unprocessed agricultural plant production not less than four hundred dollars (\$400) per acre.
- e) Land that has returned from the production of unprocessed agricultural plant products an annual gross value of not less than four hundred (\$400) per acre for three of the previous five calendar years.

URBAN DEVELOPMENT - a change of organization that contemplates or is likely to lead to the conversion of land from agricultural use to a primarily nonagricultural related use, generally resulting in the need for services such as sewer, water, fire protection, schools, drainage systems, and police protection.

5.0 DEFINITION OF INHABITED TERRITORY PER SB 244

5.1 DEFINITIONS

INHABITED TERRITORY – “Inhabited territory” for the purposes of implementing SB 244 (Wolk) shall be defined as the following list of inhabited unincorporated communities:

Binning Farms	Guinda	Rumsey
Capay	Knights Landing	West Kentucky
Clarksburg	Madison	West Plainfield
Dunnigan	Monument Hills	Willow Oak
El Macero	North Davis Meadows	Willowbank
El Rio Villa	Patwin Road	Yolo
Esparto	Royal Oak	Zamora

INHABITED UNINCORPORATED COMMUNITIES - “Inhabited Unincorporated Communities” is defined as those areas on the County of Yolo 2030 General Plan Land Use Map (see Figures LU-1B through LU-1H) that contain land use designations that are categorized as Residential by Table LU-6. The communities of Rumsey and West Kentucky are also included in this definition (even though the current land use designations are Agriculture (AG) and Commercial Local (CL) respectively) because their existing uses are residential.

6.0 MSR/SOI GUIDELINES

This document sets forth methodology and criteria to be used to assist LAFCo, its staff and interested parties in the process and determination of spheres of influence and service reviews by LAFCo.

6.1 TYPES OF SPHERES OF INFLUENCE

Cities and special districts require slightly different approaches to sphere of influence documents. Cities are municipal service providers that are generally created to provide urban services to dense populations at relatively high standard levels. Some special districts, such as community services districts and county service areas can also be created to provide municipal services, but generally on a smaller scale.

Most special districts in Yolo County provide a few specialized services to rural populations and land. For example, water district services tend to be agriculturally related, as is the Resource Conservation District. Fire districts tend to be volunteer and rural in nature. Most Cemetery

districts in Yolo County are primarily rural, but the Davis and Winters Cemetery District include the cities of Davis and Winters, respectively.

The agricultural and rural nature of unincorporated Yolo County is reflected in the sphere studies for the smaller special districts. The County's slow growth and strong agricultural conservation policies also tend to limit the growth of the special districts.

6.2 CRITERIA - MUNICIPAL SERVICES REVIEW (MSR)

LAFCo may combine cities and/or special districts by the services provided or geography for the purposes of MSR/SOI analysis. A checklist template has been developed by LAFCo staff (see appendices) to streamline the review or can also be used to determine if a service review and/or sphere of influence update is needed.

For each MSR, LAFCo shall prepare a written statement of the required determinations under Government Code §56430.

6.3 CRITERIA - SPHERES OF INFLUENCE (SOI)

In determining the sphere of influence of each local agency, LAFCo will consider and prepare a written statement of its determinations required under Government Code §56425.

LAFCo will consider the following criteria when studying and determining the spheres of influence for the cities and special districts within the County of Yolo:

- a) Retention and strengthening of community identities, as well as increasing efficiency and conserving resources, by providing essential services within a framework of controlled growth;
- b) Identification of the county's prime agricultural land and protection of this land through all available devices, such as including controlling the provision of services, requiring infill development first, and preferring non-prime land for growth. Other open-space resources such as stream banks, flood plains, and present and future recreation areas should also be protected for public benefit;
- c) Creation of realistic and controlled, yet flexible, planning areas into which anticipated services can be expanded as growth requires and as the communities' resources provide;
- d) Provision of infrastructure systems such as streets, sewers, water, open space for parks and recreation as a product of growth, rather than growth inducing;

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- e) Encouragement of city annexation or incorporation as a means of supplying the full range of urban services as required; and
 - f) Evaluation of the availability and need for basic services in each community and forecast these to meet anticipated population growth, and recommend creation, expansion, consolidation and/or reorganization of districts when need for such change is indicated.

6.4 SOI METHODOLOGY

When adopting, amending, or updating a sphere of influence, LAFCo shall do all of the following:

- a) Require the relevant cities or districts to file written statements with LAFCo specifying the functions or classes of services provided by the agencies.
- b) Establish the nature, location, and extent of any functions or classes of services provided by the existing agencies.

Both the service areas and the final boundaries call for different types and degrees of data.

6.5 SOI ANALYSIS FOR CITIES AND MUNICIPAL-LIKE SPECIAL DISTRICTS

The information needed to establish the boundaries for spheres of influence for cities and municipal-like districts is as follows:

- a) Land Demand for Growth - The data necessary to establish the amount of land (beyond existing boundaries) needed to accommodate the growth projected. While this will furnish the net bulk requirement, additional studies, such as histories of subdivisions, developments, and annexations, and the location and importance of existing open space and agricultural lands, will be needed to indicate the probable location and direction of growth. Subtraction of existing undeveloped land capable of development which is already within the city will furnish a net requirement for "new" land. Spot maps and density factors, when available, will assist in interpreting growth data.
- b) Water and Sewer Availability - The ability of each community to provide water and sewer to its service area will be a controlling factor for sphere of influence boundaries. Any agency proposing new development must show the availability of water supplies adequate for projected needs into the future. Sphere of Influence revisions and amendments will need to review water availability before including new territory in a city or municipal special district.

Services will not be required to be immediately available for any of the area. An examination of plans for future capital expenditures by the responsible agency will furnish evidence for decisions on whether the service can reasonably be expected to be extended to the area.

- c) **Willingness and Ability to Extend Community Services** - The willingness and capability of the community to provide services as growth proceeds are two of the factors determining the urban area's future. The ability to provide extension of services should include sufficient revenue for the services required following the proposed boundary change. Data involving police and fire protection, educational facilities, drainage, libraries, health services, solid waste management and other urban-type services which might be needed by the different communities should be analyzed. The study should determine present and projected fire protection, the efficiency and ability for expansion; the flood control effectiveness and its extension to the service and boundary areas; provision for parks and recreation to the expansion area; elementary and high schools and community colleges, existing and planned; solid waste disposal; and any other needed services of a specialized nature to meet individual community needs.
- d) **Regional Housing Needs** - The sphere study should also consider the agency's policies and approaches to meet its fair share of regional housing needs, if applicable. The agency under review should provide information supporting and explaining how it intends to accommodate and provide necessary governmental services for persons and families of all incomes in the most efficient and effective manner. This information is especially important if the agency proposes or is anticipated to have additional growth through the expansion of its present boundaries.
- e) **Growth Incentives and Obstructions** - Positive or negative factors regarding growth must be catalogued. Agency policies, expectations, and commitments, involving such factors as existing or planned freeway, road, or public transportation systems, shopping centers, educational facilities, industrial locations, and state and regional park acquisition and development plans that normally affect the amount and direction of growth should be included in the study.
- f) **Natural obstacles to growth, including flood plains, unsuitable soils, waterways, etc. restrict expansion into certain areas** - "Man-made" obstructions such as roads and highways, Williamson Act preserves, present and planned open-space areas for recreation and parks or buffer zones, need to be analyzed and mapped. If surface supply or ground water safe yield appear not adequate, the service cannot reasonably be

expected to be extended. Further, it may be local policy not to extend such services or otherwise to control or deter growth. This and other possible "development lien" or growth control policies must be examined as limiting factors.

- g) Information From Planning Departments - Land use designations and maps, special district maps, and school locations must be collected and organized and related to the study areas. The history of annexations to cities and special districts demonstrate when and where growth has already occurred and should be referred to as available.
- h) Agricultural Land and Open Space - All spheres will be written with full review and consideration of the adopted Agricultural Conservation Policy and the LESA Model as appropriate.
- i) Availability of Services - An assessment must be made of the willingness and feasibility of present and future agencies to extend services by agency, for example water capacity and availability, sewers and wastewater treatment facilities, as well as fire, police, drainage, recreation, landscaping maintenance, public utilities, and any other identified requirements within the projected boundary.
- j) Compatibility of Present Legal Boundaries - Existing legal boundaries in and around each community are to be mapped and analyzed as an aid to drawing lines. Special district boundaries, assessor parcels, city boundaries, and any other appropriate legal boundaries should be reviewed. Any planned extension of these areas, including planned capital expansions, should be noted.
- k) Boundaries - The current agency limits should be included in the sphere; however, if circumstance exist that make development of, or provision of services to certain areas unlikely, analysis of removing that area from the agency should be prepared.
- l) Census Districts - Census information is important for all these analyses. Agency boundaries can often be used in conjunction with the census lines in order to provide a firm statistical base for each community.
- m) Socioeconomic Interdependency - When information is available from field trips, county planning department, other county agencies and local leaders, the extent of economic, social and political influence of the community upon its surrounding area should be evaluated.

6.6 SOI ANALYSIS FOR RURAL SPECIAL DISTRICTS

The previously discussed factors for incorporated areas will be applied, as appropriate, to unincorporated areas, together with the following additional factors:

- a) Recognizable natural or manmade topographic boundaries that tend to bind an area into a geographic unit;
- b) Examination of services and political boundaries that lend identity, including but not limited to postal zones, school, library, sewer, water, census, fire, parks and recreation, and waste disposal;
- c) Examination of the identified services furnished by the special district compared to those furnished by the County; and
- d) Projected ability to provide existing services, possible need for additional services in the near future and ability to receive more efficient services through mutual aide, consolidation, reorganization or other structural organization changes.
- e) The SOI analysis will consider population projections of the agency under consideration. This will provide some flexibility to the local agency for planning growth.

6.7 LOCATING THE BOUNDARIES

The following guidelines will be used both in the delineation of the boundaries and in their interpretation:

- a) Where the sphere boundary follows a street, road, highway or railroad it will be interpreted to follow the complete right-of-way for that thoroughfare the entire road or street.
- b) When sphere boundaries are not located on streets, roads, highways, or railroads, they are intended to follow man-made boundaries (in particular, assessor parcel lines), or natural boundaries (rivers, irrigation and navigation channels, natural drainage basins and flood channels, flood control levees, etc.).
- c) When these aids are not present, the method of determining the boundary will be explained on the map or subsequently determined by LAFCo as the need arises.

6.8 CONSIDERATION OF OTHER YOLO LAFCO POLICIES

LAFCo has adopted Standards of Evaluation for boundary changes, an Agricultural Conservation Policy and a Land Evaluation and Site Assessment model by which proposals are examined. These policies and relevant considerations will be incorporated into the preparation of both the Municipal Service Reviews and Sphere of Influence studies.

6.9 AGENCY CONSULTATION

Recommendations involving policy changes, legal boundary adjustments, changes in governmental form, and proposals for implementation of the recommendations, will be developed in cooperation with the cities, county, special districts and other affected agencies.

The spheres will be provided, in draft, to the affected agencies and other interested parties before presentation to the Commission. Final recommendations will be made after consultation with area residents, landowners, and agency leaders.

6.10 PUBLIC COMMENT

For each document, citizen participation will be established sufficiently early to assure local comment. This input shall be received from members of the communities, landowners affected by recommendations, and any other residents of the area as well as any staff or volunteer of the agency under review. Discussions with the leaders of all entities will be used to identify initial problem areas, and obtain the agencies' growth plans and service capabilities.

The purpose and implications of the study and the information contribution of local leaders will be emphasized in these discussions. Through these interviews, the sphere of influence boundaries will endeavor to be consistent not only with LAFCo policy, but in the best interest of the subject agency and its inhabitants.

6.11 LAFCO ACTION ON SPHERES OF INFLUENCE

Final decisions on the sphere of influence boundaries will be determined by LAFCo at a duly noticed public hearing. The Commission will make the final determination of the actual sphere lines, based on staff analysis, public input, and other relevant factors.

Whether or not an agreement is reached regarding the boundaries, development standards, and planning and zoning requirements within a proposed sphere, LAFCo retains the discretion to adopt a sphere of influence as it determines to be appropriate under the circumstances, and shall consider a sphere of influence for the city consistent with the policies adopted by the Commission pursuant to Government Code § 56425.

6.12 REVIEW TIMEFRAME

Government Code § 56425(g) requires that each sphere of influence be reviewed every five years. This review period does not preclude LAFCo, agencies or other interested parties from requesting an earlier update for any sphere of influence if needed prior to the five-year timeframe. Occasionally, some reviews may be scheduled longer than every five years, depending on countywide agency priorities. The Commission adopts a work plan every year which includes a schedule for MSR/SOI completion.

7.0 APPENDIX

7.1 LAND EVALUATION AND SITE ASSESSEMENT MODEL

See Attached.

7.2 MSR/SOI CHECKLIST TEMPLATE

See Attached.

YOLO LOCAL AGENCY FORMATION COMMISSION LAND EVALUATION AND SITE ASSESSEMENT (LESA)

I. Introduction

The following Yolo County Land Evaluation and Site Assessment (LESA) Model has been designed as a potential planning tool to assist in making decisions concerning the relative significance of agricultural land resources. The model itself is rooted in concepts originally devised at the federal level, but has been customized to address the unique agricultural resource issues of Yolo County.

Background on LESA on the National Level

In 1981, the federal Resources Conservation Service (NRCS), known at the time as the Soil Conservation Service, released a new system that was designed to provide objective ratings of the agricultural suitability of land compared to demands created by nonagricultural uses of land. The rating system became known as Land Evaluation and Site Assessment, or LESA. Soon after it was designed, LESA was adopted as a procedural tool at the federal level for identifying and addressing the potential adverse effects of federal programs (e.g., funding of highway construction) on farmland protection. The Farmland Protection Policy Act of 1981 (Public Law 97-98) spells out requirements to ensure that federal programs, to the extent practical, are compatible with state, local and private programs and policies to protect farmland, and calls for the use of LESA to aid in this analysis. Typically, staff of the NRCS is involved in performing LESA scoring analyses of individual projects that involve other agencies of the federal government.

Local adaptation of LESA Models

Since its inception, the LESA approach has received substantial attention from state and local governments as well. Nationwide, over two hundred jurisdictions have developed local LESA methodologies. One of the attractive features of the LESA approach is that it is well suited to being modified to reflect regional and local conditions. Typical local uses of LESA have included assisting in decision-making concerning the siting of projects, alterations in land zoning, and sphere of influence determinations. LESA is also increasingly being utilized for farmland protection programs, such as the identification of priority areas to concentrate conservation easement efforts.

Common Features of all LESA Models

All LESA models are based upon the identification of factors that can be linked to the relative significance of agricultural land resources. Factors are classified as two types: (1) Land Evaluation factors, focusing on the inherent qualities of soil (and sometimes water) resources, utilizing information that is commonly found within modern soil surveys; and (2) Site Assessment factors, which typically deal with social, political, and geographic issues that are also considered important

measures of agricultural significance, such as parcel size and proximity to urban areas.

Within a given LESA model, each factor is provided with a definition of how it is to be measured, and a point scale assigned. Increasingly, LESA models rate each factor on a 100-point scale, with 0 points being assigned to factors with very low values, and highest value ratings attaining up to 100 points. Once all factors have been rated (scored) each factor becomes weighted to determine its relative importance to all of the other factors being used. As a simple example, there may be two Land Evaluation factors and two Site Assessment factors in a given model, three of which are each weighted at 30% of the total value, and the final factor weighted at 10% of the total value. The actual number of factors being rated is very flexible, and will depend upon local conditions. The important detail is that the sum of the percentages (weights) of each score must add up to 100%. In this way a single numeric score (e.g., 75 points out of 100 possible points) will be attained when all of the weighted factors are summed.

Development of the Draft Yolo County LESA model

The Draft Yolo County LESA model was developed utilizing the procedures outlined above. Land Evaluation factors include information on the USDA Land Capability Classification and Storie Index Ratings for soils mapped within the Yolo County Soil Survey, as well as a measure of irrigation availability derived from the Department of Conservation's Important Farmland Map for Yolo County. The Site Assessment factors include measurements of parcel size, proximity to built-up areas and the potential for urban conflict, and the zoning designations of all parcels directly adjacent to the parcel in question.

The following text provides specific instructions for the actual measurement and weighting of each of these factors that were developed following field-testing of the Model on selected parcels throughout Yolo County.

II. Required Resources and Information

The Yolo County Land Evaluation and Site Assessment (LESA) model requires a series of straightforward measurements and calculations to score a given project. Listed below are the materials that will generally be needed to make these determinations.

A. Land Evaluation calculations require:

- An accurate map of the project, such as a parcel map. Parcel map books are available for review at the Yolo County Planning Department.
- A Yolo County Important Farmland Map produced biennially by the California Department of Conservation (DOC). These maps are available upon request from DOC, and are also available for review at the Yolo County LAFCO and Farm Bureau offices.
- The Soil Survey of Yolo County, California (USDA Soil Conservation Service, 1971), available for review at the Natural Resources Conservation Service, UC Davis Shields Library, etc.

- A planimeter for making acreage determinations of irregularly shaped units.
- A Land Evaluation Worksheet (included in the Appendix).

B. Site Assessment Calculations Require:

- A photocopy of the appropriate page from the Yolo County Addressing System.
- Access to current zoning maps. These are available in the Yolo County Planning Department.
- A planimeter, compass and engineer's scale.
- A Site Assessment Worksheet (included in the appendix).

Additionally, the Yolo County Planning Department has developed a County Geographic Information System (GIS) that includes considerable land resource information. The GIS has the capability to calculate many of the specific acreage figures that are needed to operate the Yolo County LESA Model, thereby simplifying the procedure for obtaining a LESA score for a given project.

III. Yolo County LESA Factor Scoring

A. Scoring of Land Evaluation Factors

The Yolo County LESA includes three Land Evaluation factors that are separately rated:

1. Land Capability Classification Rating
2. Storie Index Rating
3. Irrigated Farmland Rating

Identifying A Project's Soils

In order to utilize the Land Capability Classification and Storie Index factors in the Yolo County LESA Model, it is first necessary to identify the soils that exist on a given project and determine their relative proportions. A Land Evaluation Worksheet (included in Appendix 3) is utilized to tabulate these figures, based upon the following instructions:

1. Locate the project on the appropriate map sheet in the Soil Survey.
2. Photocopy the map sheet or trace the project boundaries and the soil series map unit polygons and symbols (see Appendix 1) from the Soil Survey of Yolo County. Clearly delineate the project boundaries. [This process is fairly easy since the parcels are usually farmed in such a way that they have a distinct outline in the aerial photo that matches the parcel outline. If it is too difficult to distinguish the project boundaries on the map, they will have to be measured, paying close attention to the map scale].
3. Use the planimeter directly on the photocopied or traced map to determine the percentage of the area represented by each soil type (each soil type will have a different map unit symbol). {Trace each map unit with the planimeter three times and then average the area measured. It is important that the

appropriate scale conversion be set on the planimeter, and that measurements be made in the unit of acres}.

- 4 Identify all of the soil types contained within the project and enter the corresponding map unit symbol for each of these in Column A of the Land Evaluation Worksheet.
5. Calculate the area of each soil type with the planimeter and enter the acreage figure in Column B of the Worksheet.
6. Sum Column B to get the total area of the project and enter this amount in the box at the bottom. Crosscheck the sum by calculating the total area with the planimeter. (Note: This figure should also be close to the size designated on the parcel map.)
7. Divide the area of each soil type by the total are to get the percentage of each soil type that comprises the project. Enter the percentages in Column C. they should add up to 100%.

The Land Capability Classification Rating

- 1 In the Guide to mapping units, following page 102 in the Soil Survey of Yolo County, identify the Land Capability Classification (LCC) designation (e.g., IV-e) for each soil type that has been identified in the project, and enter it in column D of the Land Evaluation Worksheet.
2. Table 1 provides a conversion of the Land Capability Classification to a numeric score, based upon 100 points. Determine the Land Evaluation point value for each LCC from Table 1 for each soil type. Enter these point values in Column E of the Land Evaluation Worksheet.

Table 1. Conversion of Land Capability Classification units

LCC	I	Ile	Ils,w	IIle	IIls,w	IVe	IVs,w	V	VI	VII	VIII
Points	100	90	80	70	60	50	40	30	20	10	0

3. Multiply the percentage of each soil type (Column C) by the LCC points (column E) and enter the results in Column F.
4. Sum the points in Column F to obtain a single LCC score for the project

The Storie Index Rating

1. As is done with the Land Capability Classification Rating, find the Storie Index Rating (SIR) for each soil type in the Guide to mapping units, following page 102 in the Soil Survey of Yolo County. Enter these numeric ratings in Column G of the Land Evaluation Worksheet.
2. Multiply the percentage of each soil type (Column C) by the SIR (Column G) and enter the value in Column H.
3. Sum the points in Column H to get a single SIR score for the project.

The Irrigated Farmland Rating

Under the Important Farmland protocols that have been created, lands that are identified as being either Prime Farmland or Farmland of Statewide Importance, must by definition have been irrigated during the previous four years (Important Farmland maps are updated every two years). In this way, the Yolo County Important Farmland Map can be utilized as an easy and straightforward way of identifying irrigated croplands.

1. Utilizing the Yolo County Important Farmland Map to locate and delineate the project.
2. Estimate if $\geq 50\%$ or $\leq 50\%$ of the project perimeter is bordered by irrigated farmland, denoted by the symbols P and S for Prime Farmland and Farmland of Statewide Importance, respectively. (Only Prime Farmland and Farmland of Statewide Importance are considered to be irrigated in this model).
3. Estimate the percentage of the project itself that is irrigated (the percentage of the project that is defined as Prime Farmland or Farmland of Statewide Importance), utilizing a planimeter or other method.
4. Utilizing Table 2, determine the Irrigated Farmland Rating for the project, and enter this figure on the Land Evaluation Worksheet.

Table 2. Irrigated Cropland Rating

Percentage of project that is irrigated	Score if 50% surrounded by irrigated farmland	Score if $\leq 50\%$ surrounded by irrigated farmland
75-100	100	100
50-74	80	60
1-49	80	40
0	80	0

B. Scoring of Site Assessment Factors

The Yolo County LESA Model includes three Site Assessment Factors that are separately scored:

1. Project Size Rating
2. Separation from Urban Conflict Rating
3. County Zoning Rating

A Site Assessment Worksheet is included in the Appendix to facilitate the scoring of these factors.

The Project Size Rating

1. Utilizing the same information collected for the different soil types identified for a given project (tabulated in Column C of the Land Evaluation Worksheet), determine the total acreage in each of three subsets: Class I and II soils; Class III soils; and Class IV or lower soils as defined by USDA LCC. Enter the acreage figures for each subset in the appropriate space on the Site Assessment Worksheet.
2. Use Table 3 to assign a point score for each of the three subsets of soils that may be found to exist in a given project. Determine which subset yields the highest score. This figure is used as the Project Size Rating, and is entered in the Site Assessment Worksheet. (For example, a given project may consist of 100 total acres, 50 of which are LCC Class I and II soils, and the remaining 50 being LCC Class III soils. In this case, the Class I and II soils would yield a score of 80 points, while the Class III soils would yield a score of 60 points. The higher score is created by the Class I and II soils, and this score [80 points] is the one that is then used to define the Project Size Rating for this project).

Table 3. Project Size Scores

Class I and II		Class III		Class IV or Lower	
<u>Acreage</u>	<u>Points</u>	<u>Acreage</u>	<u>Points</u>	<u>Acreage</u>	<u>Points</u>
≥80	100	≥160	100	≥320	100
60-80	90	120-160	90	240-320	80
40-59	80	80-119	80	160-239	60
20-39	50	60-79	70	100-159	40
10-19	30	40-59	60	40-99	20
≤10	0	20-39	30	≤40	0
		10-19	10		
		≤10	0		

The Urban Separation Rating

The percentage of the area (acreage) of a project that is beyond 500 feet of groups of 5 or more residential units is used as a measure of a project's separation from urban areas and potential urban conflict.

1. Locate the appropriate quadrant(s) (i.e., N19) for the project on the Yolo County Addressing System Field Binder Master Key (see Appendix 1).
2. Obtain a photocopy of the necessary page(s) from the Yolo County Planning Department (quadrant N19 is page N19). Sometimes an inset is needed as well.

3. Draw the boundaries of the project on the map. Locate all the cluster of 5 or more residential units within 500 feet of the edges of the project. Use a compass or engineer's scale to delineate the entire project that is within 500 feet of the edges of the units.
4. Using a planimeter, calculate the ratio of the project's area that is outside of the 500-foot delineation compared to the total project area. Multiply by 100 to obtain the Urban Conflict Rating, and enter this figure in the Site Assessment Worksheet. (For example, a project with 90% of its area outside the 500-foot delineation would receive an urban conflict score of 90.) Simply stated, a high score under the Urban Separation Rating is the result of a low proportion of a site being in close proximity to residential areas.

The County Zoning Rating

1. Use the parcel map(s) to help locate the project on the county zoning maps maintained by the Yolo County Planning Department. Determine whether or not the project is zoned AP. Identify the zoning of all of the parcels that are immediately adjacent to the project. Note exactly where the zoning changes occur along the project perimeter.
2. Measure the perimeter of the project and determine the proportion of the perimeter that is immediately adjacent to AP zoned parcels.
3. Calculate the ratio of the portion of the perimeter adjacent to AP zoning to the entire perimeter.
4. Derive the County Zoning Rating from Table 4.

Table 4. County Zoning Rating Scores

Project Zoning	Perimeter Zoning	Zoning Score
Zoned AP	≥75% of perimeter zoned AP	100
Zoned AP	50-74% of perimeter zoned AP	75
Zoned AP	≤49% of perimeter zoned AP	50
not zoned AP	≥75% of perimeter zoned AP	100
not zoned AP	50-74% of perimeter zoned AP	50
not Zoned AP	≤49% of perimeter zoned AP	0

IV. Weighting of Land Evaluation and Site Assessment Factors

Each of the Land Evaluation and Site Assessment factors is rated on a separate 100-point scale. Once this rating has been completed, the factors are weighted to define their relative significance in creating a single LESA score for a given project.

Individual Factor Weights

Each of the Yolo County LESA factors has been weighted according to the following:

Land Evaluation Factors

Land Capability Classification	20%
Storie Index	20%
Water	10%
Land Evaluation Subtotal	50%

Site Assessment Factors

Project Size	20%
Urban Separation	15%
County Zoning	15%
Site Assessment Subtotal	50%

Total LESA Factor Weighting	100%
-----------------------------	------

In the Yolo County LESA, weighting is equally divided between the Land Evaluation factors and the Site Assessment factors (each represents 50% of the total score). For a given project, each factor's previously derived score is multiplied by the assigned weighting. The summation of each of these six weighted scores yields a single LESA score for the project, based upon 100-point scale.

V. Thresholds

The Yolo county LESA Model provides scoring thresholds that can divide agricultural land resources into four basic categories. These thresholds have been based on extensive field testing of the Model in Yolo County. The grouping are the following:

≥75 Points:	Tier 1 Agricultural Resource - the very highest agricultural importance
60-74 Points	Tier 2 Agricultural Resource - high agricultural importance
40-59 Points	Tier 3 Agricultural Resource - moderate agricultural importance
≤40 Points	Tier 4 Agricultural Resource - low agricultural importance

These thresholds are best suited for analysis of broad land use designations, such as those made under sphere of influence studies. For more specific parcel by parcel studies, such as for consideration of annexations, LESA thresholds that are based upon the individual LE and SA scores may be in order. In this way, given project would need to attain minimum score under both the LE and SA scores, in addition to the cumulative score. This reduces the likelihood of the skewing of scores (e.g. project with receiving score of 60, but with LE and SA subscores of 10 and 50).

VI. Appendix

Appendix 1 - Samples of Needed Base Information for LESA Rating

1. Zoning Map Designations
2. Soil Survey Map
3. Addressing Page

Appendix 2 - Examples of completed LESA Rating Worksheets

Examples of completed LESA Rating Worksheets

1. Land Evaluation Worksheet
2. Site Assessment Worksheet
3. Combined LESA Score Sheet

Appendix 3 - Blank LESA Worksheets

1. Land Evaluation Worksheet
2. Site Assessment Worksheet
3. Combined LESA Score Sheet

2014

MUNICIPAL SERVICE REVIEW
AND SPHERE OF INFLUENCE
STUDY

FOR THE

[insert]





Project Name: MSR/SOI for

LAFCo Project No. S-

Conducted By: Yolo Local Agency Formation Commission
625 Court Street, Suite 203
Woodland, CA 95695

Date:

Subject Agency:

Agency Address:

Agency Contact Person:

Phone Number:

**Date of Last MSR/SOI
Adopted by LAFCo**

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MSR/SOI BACKGROUND

ROLE AND RESPONSIBILITY OF LAFCo

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000, as amended (“CKH Act”) (California Government Code §§56000 et seq.), is LAFCo’s governing law and outlines the requirements for preparing Municipal Service Reviews (MSRs) for periodic Sphere of Influence (SOI) updates. MSRs and SOIs are tools created to empower LAFCo to satisfy its legislative charge of “discouraging urban sprawl, preserving open-space and prime agricultural lands, efficiently providing government services, and encouraging the orderly formation and development of local agencies based upon local conditions and circumstances (§56301). CKH Act Section 56301 further establishes that “one of the objects of the commission is to make studies and to obtain and furnish information which will contribute to the logical and reasonable development of local agencies in each county and to shape the development of local agencies so as to advantageously provide for the present and future needs of each county and its communities.”

Based on that legislative charge, LAFCo serves as an arm of the State; preparing and reviewing studies and analyzing independent data to make informed, quasi-legislative decisions that guide the physical and economic development of the state (including agricultural uses) and the efficient, cost-effective, and reliable delivery of services to residents, landowners, and businesses. While SOIs are required to be updated every five years, they are not time-bound as planning tools by the statute, but are meant to address the “probable physical boundaries and service area of a local agency” (§56076). SOIs therefore guide both the near-term and long-term physical and economic development of local agencies their broader county area, and MSRs provide the near-term and long-term time-relevant data to inform LAFCo’s SOI determinations.

PURPOSE OF A MUNICIPAL SERVICE REVIEW

As described above, MSRs are designed to equip LAFCo with relevant information and data necessary for the Commission to make informed decisions on SOIs. The CKH Act, however, gives LAFCo broad discretion in deciding how to conduct MSRs, including geographic focus, scope of study, and the identification of alternatives for improving the efficiency, cost-effectiveness, accountability, and reliability of public services. The purpose of a Municipal Services Review (MSR) in general is to provide a comprehensive inventory and analysis of the services provided by local municipalities, service areas, and special districts. A MSR evaluates the structure and operation of the local municipalities, service areas, and special districts and discusses possible areas for improvement and coordination. The MSR is intended to provide information and analysis to support a sphere of influence update. A written statement of the study’s determinations must be made in the following areas:

1. Growth and population projections for the affected area;
2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence;

3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence;
4. Financial ability of agencies to provide services;
5. Status of, and opportunities for, shared facilities;
6. Accountability for community service needs, including governmental structure and operational efficiencies; and
7. Any other matter related to effective or efficient service delivery, as required by commission policy.

The MSR is organized according to these determinations listed above. Information regarding each of the above issue areas is provided in this document.

PURPOSE OF A SPHERE OF INFLUENCE

In 1972, LAFCos were given the power to establish SOIs for all local agencies under their jurisdiction. As defined by the CKH Act, "'sphere of influence' means a plan for the probable physical boundaries and service area of a local agency, as determined by the commission" (§56076). SOIs are designed to both proactively guide and respond to the need for the extension of infrastructure and delivery of municipal services to areas of emerging growth and development. Likewise, they are also designed to discourage urban sprawl and the premature conversion of agricultural and open space resources to urbanized uses.

The role of SOIs in guiding the State's growth and development was validated and strengthened in 2000 when the Legislature passed Assembly Bill ("AB") 2838 (Chapter 761, Statutes of 2000), which was the result of two years of labor by the Commission on Local Governance for the 21st Century, which traveled up and down the State taking testimony from a variety of local government stakeholders and assembled an extensive set of recommendations to the Legislature to strengthen the powers and tools of LAFCos to promote logical and orderly growth and development, and the efficient, cost-effective, and reliable delivery of public services to California's residents, businesses, landowners, and visitors. The requirement for LAFCos to conduct MSRs was established by AB 2838 as an acknowledgment of the importance of SOIs and recognition that regular periodic updates of SOIs should be conducted on a five-year basis (§56425(g)) with the benefit of better information and data through MSRs (§56430(a)).

Pursuant to Yolo County LAFCO policy an SOI includes an area adjacent to a jurisdiction where development might be reasonably expected to occur in the next 20 years. A MSR is conducted prior to, or in conjunction with, the update of a SOI and provides the foundation for updating it.

LAFCo is required to make five written determinations when establishing, amending, or updating an SOI for any local agency that address the following (§56425(c)):

1. The present and planned land uses in the area, including agricultural and open-space lands.

2. The present and probable need for public facilities and services in the area.
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.
4. The existence of any social or economic communities of interest in the area if the commission determines that they are relevant to the agency.
5. For an update of an SOI of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

DISADVANTAGED UNINCORPORATED COMMUNITIES

SB 244 (Chapter 513, Statutes of 2011) made changes to the CKH Act related to “disadvantaged unincorporated communities,” including the addition of SOI determination #5 listed above. Disadvantaged unincorporated communities, or “DUCs,” are inhabited territories (containing 12 or more registered voters) where the annual median household income is less than 80 percent of the statewide annual median household income.

On March 26, 2012, LAFCo adopted a “Policy for the Definition of ‘Inhabited Territory’ for the Implementation of SB 244 Regarding Disadvantaged Unincorporated Communities”, which identified 21 inhabited unincorporated communities for purposes of implementing SB 244.

CKH Act Section 56375(a)(8)(A) prohibits LAFCo from approving a city annexation of more than 10 acres if a DUC is contiguous to the annexation territory but not included in the proposal, unless an application to annex the DUC has been filed with LAFCo. The legislative intent is to prohibit “cherry picking” by cities of tax-generating land uses while leaving out under-served, inhabited areas with infrastructure deficiencies and lack of access to reliable potable water and wastewater services. DUCs are recognized as social and economic communities of interest for purposes of recommending SOI determinations pursuant to Section 56425(c).

ORGANIZATION OF MSR/SOI STUDY

This report has been organized in a checklist format to focus the information and discussion on key issues that may be particularly relevant to the subject agency while providing required LAFCo’s MSR and SOI determinations. The checklist questions are based on the Cortese-Knox-Hertzberg Act, the LAFCo MSR Guidelines prepared by the Governor’s Office of Planning and Research and adopted Yolo LAFCo local policies and procedures. This report provides the following:

- Provides a description of the subject agency;
- Provides any new information since the last MSR and a determination regarding the need to update the SOI;
- Provides MSR and SOI draft determinations for public and Commission review; and
- Identifies any other issues that the Commission should consider in the MSR/SOI.

AGENCY PROFILE

Describe the agency, its location, history, number of employees, structure, services it provides, etc.. Use points and reference roads, (for example ... north of the City of Davis between CR 27 and CR 31....). Include a map of the existing agency boundary (including SOI boundary)

[Insert Figure 1 – Location Map]

AFFECTED AGENCIES

Per Government Code Section 56427, a public hearing is required to adopt, amend, or revise a sphere of influence. Notice shall be provided at least 21 days in advance and mailed notice shall be provided to each affected local agency or affected County, and to any interested party who has filed a written request for notice with the executive officer. Per Government Code Section 56014, an affected local agency means any local agency that overlaps with any portion of the subject agency boundary or SOI (included proposed changes to the SOI).

The affected local agencies for this MSR/SOI are:

County/Cities:

- City of Davis
- City of West Sacramento
- City of Winters
- City of Woodland
- County of Yolo

County Service Areas (CSAs)

- Dunnigan, El Macero, Garcia Bend, Madison-Esparto Regional CSA (MERCESA), North Davis Meadows, Snowball, Wild Wings, and Willowbank

School Districts:

- Davis Joint Unified
- Esparto Unified
- Pierce Joint Unified
- River Delta Unified
- Washington Unified
- Winters Joint Unified
- Woodland Joint Unified
- Los Rios Community College District
- Solano Community College District
- Yuba Community College District

Special Districts:

- Cemetery District – Capay, Cottonwood, Davis, Knight's Landing, Mary's, Winters
- Community Service District – Cacheville, Esparto, Knight's Landing, Madison
- Fire Protection District – Capay, Clarksburg, Dunnigan, East Davis, Elkhorn, Esparto, Knights Landing, Madison, No Man's Land, Springlake, West Plainfield, Willow Oak, Winters, Yolo, Zamora
- Sacramento-Yolo Port District
- Reclamation District – 150, 307, 537, 730, 765, 785, 787, 827, 900, 999, 1600, 2035, 2076, 2120
- Yolo County Resource Conservation District
- Water District – Dunnigan, Knight's Landing Ridge Drainage, Yolo County Flood Control & Water Conservation

Multi-County Districts:

- Reclamation District – 108 (Colusa), 2068 (Solano), 2093 (Solano)
- Water District – Colusa Basin Drainage
- Sacramento-Yolo Mosquito and Vector Control District

MUNICIPAL SERVICE REVIEW

POTENTIALLY SIGNIFICANT MSR DETERMINATIONS

The MSR determinations checked below are potentially significant, as indicated by “yes” or “maybe” answers to the key policy questions in the checklist and corresponding discussion on the following pages. If most or all of the determinations are not significant, as indicated by “no” answers, the Commission may find that a MSR update is not warranted.

- | | |
|--|--|
| <input type="checkbox"/> Growth and Population | <input type="checkbox"/> Shared Services |
| <input type="checkbox"/> Disadvantaged Unincorporated Communities | <input type="checkbox"/> Accountability |
| <input type="checkbox"/> Capacity, Adequacy & Infrastructure to Provide Services | <input type="checkbox"/> Other |
| <input type="checkbox"/> Financial Ability | |

1. GROWTH AND POPULATION

Growth and population projections for the affected area.	YES	MAYBE	NO
a) Is the agency’s territory or surrounding area expected to experience any significant population change or development over the next 5-10 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Will population changes have a significant negative impact on the subject agency’s service needs and demands such that agency investment would be required to increase capacity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Will projected growth require a change in the agency’s sphere of influence boundary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

a) Describe the current and projected population.

Describe any reasonably foreseeable development projects in the territory or surrounding area over the next 5-10 years.

- b)
c)

Growth and Population MSR Determination

Yolo LAFCo

MSR/SOI for xxxxxxxx
Date

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED REFERENCES:

- U.S. Census Bureau- American Fact Finder- *Current Population*
<http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>
- U.S Department of Finance- Population Projections
<http://www.dof.ca.gov/research/demographic/reports/view.php#objCollapsiblePanelProjectionsAnchor>
- City and/or County General Plans
- City and/or County planning departments

2. DISADVANTAGED UNINCORPORATED COMMUNITIES

The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.

	YES	MAYBE	NO
a) Does the subject agency provide public services related to sewers, municipal and industrial water, or structural fire protection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any "inhabited unincorporated communities" (per adopted Commission policy) within or adjacent to the subject agency's sphere of influence that are considered "disadvantaged" (80% or less of the statewide median household income) that do not already have access to public water, sewer and structural fire protection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) If "yes" to both a) and b), it is feasible for the agency to be reorganized such that it can extend service to the disadvantaged unincorporated community (if "no" to either a) or b), this question may be skipped)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

- a) Please see agency profile. A "yes" response indicates that the agency provides a service that may trigger the provisions of SB 244 and a LAFCo determination regarding any disadvantaged unincorporated communities within or adjacent to the agency's sphere of influence is required. A "no" response indicates that the provisions of SB 244 would not apply to a SOI update, if applicable.
- b) The term "Inhabited Unincorporated Communities" is defined per Commission adopted policy as those areas on the County of Yolo 2030 General Plan Land Use Map (see Figures LU-1B

through LU-1H) that contain land use designations that are categorized as Residential by Table LU-6. The communities of Rumsey and West Kentucky are also included in this definition (even though the current land use designations are Agriculture (AG) and Commercial Local (CL) respectively) because their existing uses are residential. These communities are as follows:

Binning Farms	Guinda	Rumsey
Capay	Knights Landing	West Kentucky
Clarksburg	Madison	West Plainfield
Dunnigan	Monument Hills	Willow Oak
El Macero	North Davis Meadows	Willowbank
El Rio Villa	Patwin Road	Yolo
Esparto	Royal Oak	Zamora

If any of the above listed communities are located within the agency's territory or surrounding area:

- Describe the current statewide median household income. Define what 80% of that would be, in order to determine the median household income threshold for being defined as a disadvantaged unincorporated community.
- Provide median household income data on the inhabited unincorporated community, if applicable, and determine if they are considered "disadvantaged unincorporated communities" according to SB 244.
- Describe the location and characteristics of the DUC.

If none of these communities are located within or surrounding the agency's territory, just say so and income information is not needed.

c) Is there any way to extend services to the DUC? Is it feasible?

Disadvantaged Unincorporated Communities MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED REFERENCES:

- U.S. Census Bureau- Median Household Incomes
<http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

3. CAPACITY AND ADEQUACY OF PUBLIC FACILITIES AND SERVICES

Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.

	YES	MAYBE	NO
a) Are there any deficiencies in agency capacity to meet service needs of existing development within its existing territory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any issues regarding the agency's capacity to meet the service demand of reasonably foreseeable future growth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Are there any concerns regarding public services provided by the agency being considered adequate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Are there any significant infrastructure needs or deficiencies to be addressed for which the agency has not yet appropriately planned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Are there changes in state regulations on the horizon that will require significant facility and/or infrastructure upgrades?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Are there any service needs or deficiencies for disadvantaged unincorporated communities related to sewers, municipal and industrial water, and structural fire protection within or contiguous to the agency's sphere of influence?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)

Capacity and Adequacy of Public Facilities and Services MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For “NO” responses: Be brief but clearly demonstrate why the answer is no.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

Responses may require discussion of the following issues:

- Describe the organization’s service delivery system, including any infrastructure or facilities.
- Discuss any complaints filed by community members or neighboring organizations.
- Discuss any compliance issues with State regulations.
- Describe the potential for future population growth or development, and discuss the organization’s ability to meet the expanding service delivery demands that will accompany that growth. In particular, consider infrastructure or staffing expansions that will be required to meet the additional demand for services.
- Describe both near-term and long-term infrastructure needs and deficiencies.
- Discuss the organization’s plan for dealing with upcoming infrastructure needs and deficiencies.
- If the agency provides sewer, municipal and industrial water, or structural fire protection services, describe any disadvantaged unincorporated communities within or contiguous to the organization’s sphere of influence. Describe the level and adequacy of services that these communities are receiving and identify any service deficiencies that should be addressed.

SUGGESTED REFERENCES:

- Yolo County General Plan
<http://www.yolocounty.org/Index.aspx?page=1514>
- Agency General Plan, Facility Master Plan or Capital Improvement Plan

4. FINANCIAL ABILITY

Financial ability of agencies to provide services.

	YES	MAYBE	NO
a) Does the organization routinely engage in budgeting practices that may indicate poor financial management, such as overspending its revenues, failing to commission independent audits, or adopting its budget late?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Is the organization lacking adequate reserve to protect against unexpected events or upcoming significant costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yolo LAFCo

MSR/SOI for xxxxxxxx
Date

c) Is the organization's rate/fee schedule insufficient to fund an adequate level of service, and/or is the fee inconsistent with the schedules of similar service organizations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Is the organization unable to fund necessary infrastructure maintenance, replacement and/or any needed expansion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Is improvement needed in the organization's financial policies to ensure its continued financial accountability and stability?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Is the organization's debt at an unmanageable level?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

a) **Budget:**

Describe the organization's budget cycle, who is responsible for approving the organization's budget, and whether budgets are passed regularly and on-time.

Discuss whether the organization has regular independent audits.

Describe the organization's major expenditure categories (Include a 5-year trend chart).

Discuss how the expenditures have changes since the previous MSR/SOI.

Discuss any opportunities to reduce expenditures.

Describe the organization's major revenue sources (Include a 5-year trend chart).

Describe any grants or donations the organization has received since the previous MSR/SOI.

Discuss how revenues have changed since the previous MSR/SOI.

Discuss the stability of the revenue sources.

Discuss any opportunities to increase revenues.

Describe the organization's "revenues less expenditures" and end of year fund balances (Include a 5-year trend chart).

b) **Reserves:**

Describe the organization's reserve and contingency fund balances (Include a 5-year trend chart).

Describe the organization's reserve and/or contingency fund policies.

Discuss whether the organization regularly contributes to the reserve, and if so, how much.

Discuss whether the organization has used its reserve or contingency fund recently.

Discuss whether the organization's level of reserve is adequate to protect against unexpected events or upcoming significant costs.

c) **Rate/Fee Schedule:**

Describe the organization's rate/fee schedule.

Discuss when the rate/fee schedule was adopted, and describe any recent efforts to alter the rate/fees schedule.

Compare the organization's rate/fee schedule to other organization's providing similar services in the region.

Describe the relationship between the rate/fee structure and level of service.

d) **Infrastructure Maintenance and Replacement:**

Describe the organization's capital improvement plan and/or infrastructure maintenance and replacement schedule.

Discuss whether the organization is on track with the timeline outlined in its infrastructure plan.

Discuss the organization's plans for funding upcoming maintenance and replacements.

e) **Financial Policies:**

Describe the organization's financial policies.

Discuss whether the policies are in keeping with best practices.

Discuss when the policies were adopted, and if they are appropriately updated.

f) **Debt:**

Describe any debt that the organization is currently repaying, including the total original amount and remaining balance, type of debt, interest rate, use of debt, and payment schedule.

Describe any debt that has been paid off by the organization since the most recent MSR/SOI.

Discuss any debt the organization expects to incur in the near future.

Describe the organization's debt management policy.

Financial Ability MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For "NO" responses: Be brief but clearly demonstrate why the answer is no, cite sources, etc.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

SUGGESTED RESOURCES:

- Budget Reports/Financial Statements
- Independent Audits/ Comprehensive Annual Financial Report (CAFR)
- Grant Donation History
- Rate/Fee Schedule
- California State Controller's Office- Special District Annual Financial Reports
 - Reports include revenues, expenditures, and long-term debt information for every California special district
http://www.sco.ca.gov/ard_locarep_districts.html
- Government Finance Officers Association- Best Practices
http://www.gfoa.org/index.php?option=com_content&task=view&id=118&Itemid=130

5. SHARED SERVICES AND FACILITIES

Status of, and opportunities for, shared facilities.

	YES	MAYBE	NO
a) Are there any opportunities for the organization to share services or facilities with neighboring or overlapping organizations that are not currently being utilized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any governance options that may produce economies of scale and/or improve buying power in order to reduce costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Are there governance options to allow appropriate facilities and/or resources to be shared, or making excess capacity available to others, and avoid construction of extra or unnecessary infrastructure or eliminate duplicative resources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)

Shared Services MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For “NO” responses: Be brief but clearly demonstrate why the answer is no.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

Responses may require discussion of the following issues:

- Describe organizations within proximity to the organization that offer similar services.
- Discuss shared services or use of facilities that are currently being implemented.
- Discuss opportunities for shared services or facilities that are not currently being utilized.
- Discuss what actions would be required to implement those opportunities and the potential benefit of such efficiencies.

SUGGESTED RESOURCES:

- Agency interviews
- Review of any service agreements, i.e. MOUs or JPAs...

6. ACCOUNTABILITY, STRUCTURE AND EFFICIENCIES

Accountability for community service needs, including governmental structure and operational efficiencies.

	YES	MAYBE	NO
a) Are there any issues with meetings being accessible and well publicized? Any failures to comply with disclosure laws and the Brown Act?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any issues with filling board vacancies and maintaining board members?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Are there any issues with staff turnover or operational efficiencies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Is there a lack of regular audits, adopted budgets and public access to these documents?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Is the agency involved in any Joint Powers Agreements/Authorities (JPAs)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Are there any recommended changes to the organization's governance structure that will increase accountability and efficiency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Are there any governance restructure options to enhance services and/or eliminate deficiencies or redundancies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- h) Are there any opportunities to eliminate overlapping boundaries that confuse the public, cause service inefficiencies, unnecessarily increase the cost of infrastructure, exacerbate rate issues and/or undermine good planning practices?
-

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)
- g)

Accountability, Structure and Efficiencies MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

For “NO” responses: Be brief but clearly demonstrate why the answer is no.

For “YES” or “MAYBE” responses: Discuss the reasoning for your response in detail.

Responses may require discussion of the following issues:

- Describe the organizations governance structure and meeting schedule.
- Describe efforts the organization has made to ensure accountability including, regularity of governance meetings, compliance with the Brown Act, and public outreach efforts.
- Describe the organizations staffing level and service delivery system.
- Describe how the organization processes complaints or service delivery issues.
- Describe any potential opportunities for consolidation with neighboring organizations that might increase accountability or efficiency.

SUGGESTED RESOURCES:

- Organization's website
- Agency Interviews
- Customer feedback

7. OTHER ISSUES

Any other matter related to effective or efficient service delivery, as required by commission policy.

	YES	MAYBE	NO
a) Are there any other service delivery issues that can be resolved by the MSR/SOI process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

a) Describe the additional issue.

Discuss opportunities for resolution

Other Issues MSR Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED RESOURCES:

- Organization's website
- Agency interviews or discussion with Supervisorial District staff.

SPHERE OF INFLUENCE STUDY

On the basis of the Municipal Service Review:

- Staff has reviewed the agency's Sphere of Influence and recommends that a SOI Update is NOT NECESSARY in accordance with Government Code Section 56425(g). Therefore, NO CHANGE to the agency's SOI is recommended and SOI determinations HAVE NOT been made.

- Staff has reviewed the agency's Sphere of Influence and recommends that a SOI Update IS NECESSARY in accordance with Government Code Section 56425(g). Therefore, A CHANGE to the agency's SOI is recommended and SOI determinations HAVE been made and are included in this MSR/SOI study.

SPHERE OF INFLUENCE MAP(S)

Insert Figure(s) of existing SOI (and proposed SOI if applicable)

POTENTIALLY SIGNIFICANT SOI DETERMINATIONS

If no SOI is recommended, the following determinations sections should be deleted from the study.

The SOI determinations below are potentially significant, as indicated by "yes" or "maybe" answers to the key policy questions in the checklist and corresponding discussion on the following pages.

- Present and Planned Land Uses
- Need for Public Facilities and Services
- Capacity and Adequacy of Provide Services
- Social or Economic Communities of Interest
- Disadvantaged Unincorporated Communities

1. PRESENT AND PLANNED LAND USES

The present and planned land uses in the area, including agricultural and open-space lands.

	YES	MAYBE	NO
a) Are there any present or planned land uses in the area that would create the need for an expanded service area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Would the SOI conflict with planned, orderly and efficient patterns of urban development?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Is there a conflict with the adopted SACOG Metropolitan Transportation Plan/Sustainable Communities Strategy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Would the SOI result in the loss of prime agricultural land or open space?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Would the SOI impact the identity of any existing communities; e.g. would it conflict with existing postal zones, school, library, sewer, water census, fire, parks and recreation boundaries?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Are there any natural or made-made obstructions that would impact where services can reasonably be extended or should otherwise be used as a logical SOI boundary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Would the proposed SOI conflict with a Census boundary, such that it would compromise the ability to obtain discrete data?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)
- g)

Present and Planned Land Uses SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

2. NEED FOR PUBLIC FACILITIES AND SERVICES

The present and probable need for public facilities and services in the area.

	YES	MAYBE	NO
a) Would the SOI conflict with the Commission's goal to increase efficiency and conservation of resources by providing essential services within a framework of controlled growth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Would the SOI expand services that could be better provided by a city or another agency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Does the SOI represent premature inducement of growth or facilitate conversion of agriculture or open space lands?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Does the SOI conflict with the Regional Housing Needs Analysis (RHNA) or other SACOG growth projections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Are there any areas that should be removed from the SOI because existing circumstances make development unlikely, there is not sufficient demand to support it or important open space/prime agricultural land should be removed from urbanization?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Have any agency commitments been predicated on expanding the agency's SOI such as roadway projects, shopping centers, educational facilities, economic development or acquisition of parks and open space?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)
- c)
- d)
- e)
- f)

Need for Public Facilities and Services SOI Determination

Yolo LAFCo

MSR/SOI for xxxxxxxx
Date

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

SUGGESTED RESOURCES:

- SAGOC SCS land use map
- County General Plan
- Agency Capital Improvement Plans

3. CAPACITY AND ADEQUACY OF PROVIDED SERVICES

The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.

	YES	MAYBE	NO
a) Are there any issues regarding the agency's capacity to provide services in the proposed SOI territory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Are there any issues regarding the agency's willingness and ability to extend services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion: (responses can be combined if appropriate)

- a)
- b)

Capacity and Adequacy of Provided Services SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

4. SOCIAL OR ECONOMIC COMMUNITIES OF INTEREST

The existence of any social or economic communities of interest in the area if the commission determines that they are relevant to the agency.

	YES	MAYBE	NO
a) Are there any "inhabited unincorporated communities" (per adopted Commission policy) within or adjacent to the subject agency's sphere of influence that are considered "disadvantaged" (same as MSR checklist question 2b)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

a) Please see response to MSR checklist question 2b.

Social or Economic Communities of Interest SOI Determination

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

5. DISADVANTAGED UNINCORPORATED COMMUNITIES

For an update of an SOI of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

	YES	MAYBE	NO
a) Does the subject agency provide public services related to sewers, municipal and industrial water or structural fire protection (same as MSR checklist question 2a)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) If yes, does the proposed SOI exclude any disadvantaged unincorporated community (per MSR checklist question 2b) where it either may be feasible to extend services or it is required under SB 244 to be included?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discussion:

a) Please see response to MSR checklist question 2a.

b)

Disadvantaged Unincorporated Communities SOI Determination

Yolo LAFCo

MSR/SOI for xxxxxxxx
Date

Summary/concluding statement regarding the determination as a whole for use in staff reports, resolutions, findings, etc.

REFERENCES

ATTACHMENTS