

SACRAMENTO LOCAL AGENCY FORMATION COMMISSION
1112 I Street, Suite #100, Sacramento, California 95814
(916) 874-6458

MUNICIPAL SERVICE REVIEW WORKSHEET
AND QUESTIONNAIRE
DISTRICT PROFILE

Date:

Agency Name:

Address:

Website:

Telephone: (FAX)

Administrator Name:

Title:

Name of Contact:

Contact's E-mail Address:

Agency's Principle Act:

Services Provided:

Latent Powers:

Governing Body:

Total Number of Employees:

Represented

Unrepresented

Acreage/ sq. Miles within Agency:

Total Population within Agency:

Total Registered Voters within Agency:

INTRODUCTION

Background Information

The _____ District is an Independent/Dependant Special District.

- **Mission:**
- **Setting:**
(Please attach map of the district boundary)

History

The District was formed in _____. The District was established to provide _____ services

(Please feel free to provide historical context.)

Services Provided

Management and Staffing Structure

Management Structure

Employment Structure

The District employs: _____ full time positions.

In addition, the District employs on average ____ part-time, _____ seasonal and _____ positions.

Please attach organization chart.

- The type and purpose of contracts and consultants.
- Please feel free to mention any awards or recognition the agency has received.
- Describe ongoing training and personnel policies.
- Are salaries and pay scales comparable/ competitive with regional and industry standards?
- Is organization structure similar with like service providers?

Municipal Service Review Information and Determinations

1. Growth and Population Projections (This provides the public with a “snapshot” of your community.)

Type of Information to be provided:

- What is the current level of demand for services?
- What is the projected demand for services?
- Please provide growth rate and population projections.
- Please provide any other information relevant to planning for future growth or changing demographics.

LAFCo MSR Determination

LAFCo to Complete

2. Facilities and Programs

A. Facilities

Summary of Facilities (Parks, Physical Plant)

NAME	LOCATION	SIZE (Acres)	AMENITIES/SPECIAL FEATURES	DESCRIPTION

(Attach additional page if necessary)

Please attach Facilities Map.

Present and Planned Capacity of Public Facilities

- What is the current and projected service capacity?
- What is the level of adequacy of services and facilities to serve current and future population?
- What Performance Measures are used by the District to determine service adequacy?

Infrastructure Needs or Deficiencies/Capital Improvement Program

- Describe the District's Capital Improvement Program, as applicable.

- Describe deferred maintenance strategy.
- Describe policies and practices for depreciation and replacement of infrastructure.
- How will new or upgraded infrastructure and deferred maintenance be financed?
- List infrastructure deficiencies, if any; indicate if deficiencies have resulted in permit or other regulatory violations; if necessary, explain how deficiencies will be addressed.
- Provide evidence of compliance with applicable regulatory standards (for example, CA R-39-97 (Certified Playground Safety Standards) for Recreation and Parks Districts)

B. Programs

Summary of Programs (Recreation, Education, Conservation, etc.)

NAME	LOCATION(S)	SIZE (# Participants)	DESCRIPTION

(Attach additional page if necessary)

LAFCo Determination

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3. **Financial Information**

Budget (Please attach current budget.)

Revenue

- Describe all revenue sources (i.e., property taxes, special taxes, service charges, fees, rentals, assessments, grants, etc.).

Rates, Fees, Charges, and Assessments

- Describe rate setting methodology.
- Explain constraints associated with agency's ability to generate revenue. What options are available – special assessments/ special taxes/ increases in sales tax/impact fees/grants, etc.?
- Please provide a comparison of rates and charges with similar service providers (favorable or less so).
- Describe revenue constraints.

Expenditures

- Describe the agency's Service Levels compared to industry standards and measurements.
- Describe the Cost of Service compared to industry standards and measurements.

Assets, Liabilities, Debt, Equity, and Reserves

- Provide the Book Value of Assets.
- Provide a list of equipment, land, and other fixed assets.
- Provide a summary of long term debt and liabilities.
- Explain the agency's bond rating; discuss reason for rating. Discuss amount and use of existing debt. Describe proposed financing and debt requirements.
- Describe policies and procedures for investment practices
- Describe policies and procedures for establishing and maintaining reserves/retained earnings.

- What is the dollar limit of reserves/retained earnings?
- What is the ratio of undesignated, contingency, and emergency reserves to annual gross revenue?

Summary of Revenue Sources

Fiscal Year	2006/07	2007/08	2008/09	2009/10	Projected
Property Taxes					
Interest					
Rental Income					
HPTR					
In-Lieu Fees					
State & Federal Grants					
Recreation Fees & Grants					
Miscellaneous					
Fund Balance Available					
Total					

Summary of Expenditures

Fiscal Year	2006/07	2007/08	2008/09	2009/10	Projected
Salaries & Wages					
Services & Supplies					
Long-Term Debt					
Capital Improvements ¹					
Equipment					
Contingency ²					
Total					

1. Identify Sources of Funding:
2. Fixed or Variable?

Summary of Financial and Operational Information

	2009/10
Population	
Area Served	
Developed Real Estate	
Undeveloped Real Estate	
Service Standard Ratios ¹	
Full Time Employees	
Average Part-Time Employees	
Total Annual Budget	
Per Capita Spending	
Total Annual Administrative Costs	
% Annual Administrative Costs to Total	
Estimated Deferred Maintenance	
Average Capital Improvements (5 Years)	
Reserve Amount	
Operational Cost per Employee	
Average Property Tax Rate	

1. For example, Park acres per 1000 residents

LAFCo Determination

LAFCo to Complete

4. Status of and Opportunities for Innovation and Shared Facilities

- a) Describe existing and/or potential shared facilities, infrastructure, and staff. Describe any joint power agreements or other agreements for sharing resources with other agencies.
- b) Describe existing and/or potential joint use planning.
- c) Describe existing and/or potential duplication with existing or planned facilities or services with other agencies.
- d) Describe availability of any excess capacity to serve customers or other agencies.
- e) Describe any economies of scale in shared purchasing power, and any other cost-sharing opportunities that can be implemented by joint use or sharing resources.
- f) Describe any duplication (overlap), or gaps in services or boundaries.
- g) Describe ongoing cost avoidance practices. (For example, if you hire contract vs. in-house employees, is the bidding process cost effective and efficient)?
- h) Describe any opportunities to reduce overhead and operational costs.
- i) Describe any opportunities to reduce duplication of infrastructure.
- j) Identify any areas outside agency boundary which could be efficiently served by existing or proposed agency facilities.
- k) Identify any areas within agency boundary which could be more efficiently served by another agency.
- l) Are your service plans compatible with those of other local agencies?

LAFCo Determination

LAFCo to Complete

5. Accountability for Community Service Needs, including Governmental Structure and Operational Efficiencies

- a) Explain the composition of the agency's governing board.
- Number of Directors:
 - Nature/ Length of Terms:
 - Is governing body landowner or population based?
 - Are Directors elected or appointed?
 - Are elections or appointments at large or by district?
- b) Explain compensation and benefits provided to the governing board, including any benefits that continue after term of service.
- c) Where and how frequently does the governing board meet?
- d) Describe rules, procedures, and programs for public notification of agency operations, meetings, programs, etc.
- How is public participation encouraged?
 - Are meetings accessible to the public, i.e., evening meetings, adequate meeting space, etc.?
- e) Describe public education/outreach efforts, (i.e., newsletters, bill inserts, website, etc.)
- f) Describe level of public participation, and ways that staff and Directors are accessible to the public.
- g) Describe ability of public to access information and agency reports.
- h) Describe any opportunities to eliminate service islands, peninsulas and other illogical service areas.

LAFCo Determination

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6. Issues, Concerns and Opportunities

Please provide information regarding any issues or concerns related to operations (financial, managerial, legal, organizational, etc.)

- Compliance with Environmental Justice requirements
- Compliance with regulatory reporting requirements
- Compliance with regulatory agencies and public health and safety issues.

LAFCo Determination

To be completed by LAFCo

Attachments:

District Map
Facilities Map
Organization Chart
Budget