

LEGISLATIVE POLICY L-106

Subject:

STRATEGY FOR CONDUCTING AND USING MUNICIPAL SERVICE REVIEWS

Purpose

To establish a framework that will assist the Local Agency Formation Commission in the timing, funding and preparation of municipal service reviews, while maintaining a focus on the service review determinations specified in State Law (GC 56430).

Background

AB 2838 (Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000) requires Local Agency Formation Commissions to conduct countywide, regional, or sub-regional municipal service reviews either before, or in conjunction with the establishment or updates of spheres to help ensure the efficient provision of local governmental services. The process of information collection, data analysis, and development of the service review determinations requires a high level of participation and cooperation between San Diego LAFCO and local agencies.

Policy

It is the policy of the San Diego Local Agency Formation Commission to use the following six strategies to assist in the planning and preparation of municipal service reviews:

1. *Scope of Work:* In order to successfully manage the data collection and analysis processes and guide service reviews toward timely completion, each service review should have a well-defined scope of work that incorporates the following:
 - a. Develop and adhere to a realistic and manageable scope of work.
 - b. Define the services to be reviewed.
 - c. Identify unambiguous geographic boundaries for study areas.
 - d. Define the time period under review.
2. Defer review of services or service providers, which are marginally related to the pending service review, to subsequent service reviews, if necessary and appropriate. *Requests for Information:* Collection of data is dependent on the

cooperation and voluntary participation of local agencies. Requests for information should not represent an undue burden to local agencies and should be conducted in the following manner to maximize cooperation and participation levels:

- a. Discourage multiple requests for information unless there are compelling reasons.
 - b. Limit requests for information to matters that are essential to conduct the service review and relevant to the nine determinations required by Government Code § 56430.
3. *Service Review Time Frame:* Service reviews provide a snapshot view of service delivery issues and are not meant to be ongoing studies. The following approaches will enable service reviews to be conducted in the shortest amount of time:
- a. Develop a task and time schedule for each service review and adhere to it.
 - b. Confine data collection to the time period established under the scope of work unless there are compelling reasons to expand the time frame.
4. *Regional View:* Service reviews represent programmatic or macro-level information reports. The following approaches will reinforce the programmatic focus of service reviews:
- a. Adhere to the seven service review determinations in maintaining a programmatic view of service delivery.
 - b. Focus on service delivery programs, procedures, policies and rules, rather than individuals who may be involved in the service delivery programs.
 - c. Collect micro-level data only if necessary and if associated with programmatic aspects of service delivery.
5. *Level of Inquiry:* Multiple agencies may be involved with a service review. Individual agencies may be subject to different levels of review and inquiry based on the following:

- a. Allow for variation within the type and amount of information requested for each service review and from each local agency based on unique circumstances. Utilize the judgment of staff, commissioners, advisory committees, stakeholders, public and agencies, etc., to establish an appropriate level of inquiry and data collection.
 - b. Defer the collection of data that is marginally related to the pending service review to subsequent service reviews.
6. *Data Accuracy:* Accurate data is essential for making meaningful conclusions and determinations. In some cases, LAFCO staff may not be qualified to ascertain accuracy of data and will need to obtain outside assistance. In other instances, either raw data, or conclusions of service review may not be germane to LAFCO's purview of the service review determinations required by State Law. In order to maintain focus on accuracy and relevancy of data:
- a. Utilize LAFCO staff, the Commission's advisory committees, local service agencies, or other appropriate organizations to determine data accuracy and relevancy.
 - b. Refer service reviews to other regulatory agencies if data is determined to pertain to areas outside of LAFCO's purview, or is not relevant to a pending service review.
 - c. Draft Municipal Service Reviews (MSR's) shall be provided to the affected agencies and public through direct mail or posting on the Commission website (www.sdlafco.org) for comment.

Adopted: April 7, 2003
 Technically
 Updated: August 25, 2008
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