



**San Diego County**  
**Local Agency Formation Commission**  
 Regional Service Planning | Subdivision of the State of California

**7f**

**AGENDA REPORT**  
 Business | Information

June 2, 2025

**TO:** Chair Whitburn and Commissioners

**FROM:** Michaela Peters, Analyst II  
 Meghan Traynor, Analyst I

**SUBJECT:** Report on the 2025 CALAFCO Staff Workshop

**SUMMARY**

The San Diego County Local Agency Formation Commission (LAFCO) will receive an informational update following staff’s participation in the California Association of LAFCOs’ (CALAFCO) Annual Staff Workshop, held April 30–May 2 at the Temecula Creek Inn in Temecula. This annual workshop - hosted by Riverside LAFCO and organized by CALAFCO’s Southern Region - provided professional development and networking opportunities for LAFCO staff across the state. The program featured presentations led by LAFCO practitioners, subject matter experts, and consultants. San Diego LAFCO staff attended one day of the three-day event and participated in seven sessions. Staff also contributed to two sessions: a general session titled “*Tips to Improve the MSR Process*” and a breakout session, “*Balancing Growth and Green: LAFCO’s Role in the Future of Agriculture.*” This report is provided consistent with past practice and for informational purposes only.

**BACKGROUND**

CALAFCO is a 501(c)(3) non-profit membership organization established in 1971. All LAFCOs are eligible for membership, with annual dues - structured on a progressive scale based on county population tiers - accounting for nearly four-fifths of the organization’s annual revenue. CALAFCO’s core mission is to promote statewide coordination and serve as a resource to the Legislature and other public entities. The organization is structured into four regions and governed by a 16-member Board of Directors.

<p><b>Administration</b>          Keene Simonds, Executive Officer          2550 Fifth Avenue, Suite 725          San Diego, California 92103          T 619.321.3380          E lafco@sdcounty.ca.gov          www.sdlafco.org</p>	<p><b>Joel Anderson</b>          County of San Diego</p> <p><b>Jim Desmond</b>          County of San Diego</p> <p><b>Vacant, Alt.</b>          County of San Diego</p>	<p><b>Kristi Becker</b>          City of Solana Beach</p> <p><b>Dane White</b>          City of Escondido</p> <p><b>John McCann Alt.</b>          City of Chula Vista</p>	<p><b>Chair Stephen Whitburn</b>          City of San Diego</p> <p><b>Marni von Wilpert, Alt.</b>          City of San Diego</p>	<p><b>Vice Chair Barry Willis</b>          Alpine Fire Protection</p> <p><b>Jo MacKenzie</b>          Vista Irrigation</p> <p><b>David Drake, Alt.</b>          Rincon del Diablo</p>	<p><b>Vacant</b>          General Public</p> <p><b>Brigitte Browning, Alt.</b>          General Public</p>
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## DISCUSSION

This item is presented for San Diego LAFCO to receive a report on staff's participation at the recent CALAFCO Annual Staff Workshop, held April 30–May 2 at the Temecula Creek Inn in Temecula. San Diego LAFCO was represented by four staff members – Analyst II Michaela Peters, Analysts I Jolle Burila and Meghan Traynor, and Communications Associate Aiden Velasquez. Staff contributed to the workshop program by presenting in two separate sessions, highlighting San Diego LAFCO's innovative approaches to municipal service reviews and agricultural sustainability. Key highlights from the workshop follow.

### Spotlight on San Diego LAFCO's Approach to MSRs

Analyst II Michaela Peters participated in the General Session, “*Tips to Improve the MSR Process,*” and shared San Diego LAFCO's “Hybrid Approach” to municipal service reviews. This model combines consultant-prepared technical analyses - covering services such as water, wastewater, fire protection and emergency medical, and/or regional transportation and housing - while maintaining internal responsibility for overall project management and preparation of remaining MSR components.

### Spotlight on Agricultural Land Conservation and San Diego LAFCO's SALC Grant

Analyst II Michaela Peters and Analyst I Meghan Traynor co-led a breakout session titled “*Balancing Growth and Green: LAFCO's Role in the Future of Agriculture.*” The session explored LAFCOs' statutory role in preserving agricultural and open-space lands, integrating environmental justice considerations, and planning tools to manage growth. The session also featured Chief Planning Manager Jesse Davis (City of Ukiah), who presented a case study on the preservation of 750 acres of agriculture and open space in collaboration with Mendocino LAFCO. San Diego LAFCO's ongoing efforts under the SALC program were also featured and highlighted by the successes of SALC 1.0 and 2.0 with a preview of the anticipated SALC 3.0.

The Staff Workshop program is provided as Attachment One.

## ANALYSIS

None.

## RECOMMENDATION

This item is presented to San Diego LAFCO for information only.

## ALTERNATIVES FOR ACTION

None.

## PROCEDURES

This item has been placed on San Diego LAFCO's agenda for information as part of the business calendar. The following procedures are recommended:

- 1) Receive verbal presentation from staff, unless waived.
- 2) Invite comments from interested audience members, if any.
- 3) Discuss item and provide feedback as appropriate.

On behalf of staff,



Michaela Peters  
Analyst II

Attachment:

- 1) CALAFCO 2025 Staff Workshop Program

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**2025** | **STAFF WORKSHOP**  
**we | come**

California Association of  
Local Agency Formation Commissions

**CALAFCO**

SUPPORTING SUSTAINABLE  
COMMUNITY GROWTH



**April 30 - May 2, 2025**

**Temecula Creek Inn**

**44501 Rainbow Canyon Rd**

**Temecula, CA 92592**

Hosted by Riverside LAFCO

**CALAFCO.ORG**

## Schedule At-a-Glance

### WEDNESDAY, APRIL 30

#### 7:30 a.m. MOBILE WORKSHOP

Tour of Wilson Creek Winery & Vineyards – Bus loads at 7:30 a.m. and departs promptly at 7:45 a.m.

#### 1:30 p.m. WORKSHOP OPENING

#### 2:00 p.m. GENERAL SESSION

Ballots & Boundaries: Navigating the Ins and Outs of LAFCO Protest Hearing and Elections

#### 3:15 p.m. REFRESHMENT BREAK

#### 3:30 p.m. GENERAL SESSION

Back to Basics: How Well Do We Know Ourselves and the Law?

#### 5:30 p.m. WELCOME RECEPTION

#### 7:00 p.m. DINNER ON YOUR OWN

### THURSDAY, MAY 1

#### 7:00 a.m. BREAKFAST BUFFET

#### 9:00 a.m. GENERAL SESSION

Tips to Improve the MSR Process

#### 10:30 a.m. SNACK BREAK

#### 10:45 a.m. BREAKOUT SESSIONS

- CEQA: Everything you need to know under 90 minutes
- Making Sense of SB 938: The Adventure of Del Paso Manor Water District

#### 12:30 p.m. LUNCHEON

#### 1:45 p.m. BREAKOUT SESSIONS

- Cracking the Code for Island Annexations: Insights, Challenges, and What's Next
- Navigating ADA PDF Compliance

#### 3:15 p.m. SNACK BREAK

#### 3:30 p.m. BREAKOUT SESSIONS

- Funding the Gap: Enhancing Services and Infrastructure in Disadvantaged Communities
- Balancing Growth and Green: LAFCO's Role in the Future of Agriculture

#### 5:30 p.m. CALAFCO DINNER

### FRIDAY, MAY 2

#### 7:00 a.m. BREAKFAST BUFFET

#### 9:00 a.m. GENERAL SESSION

- Navigating stormy waters & turning the ship around. A special focus group/visioning session

#### 12:00 p.m. WORKSHOP ADJOURNS

# CALAFCO GOLD ASSOCIATE MEMBERS



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## TEMECULA CREEK INN



# AGENDA

## WEDNESDAY, APRIL 30

**7:30 a.m. - 12:30 p.m. MOBILE WORKSHOP : Tour of Wilson Creek Winery & Vineyards**  
*Bus loads at 7:30 a.m. and departs promptly at 7:45 a.m.*

**LOCATION:**  
Hotel Front (board bus)

Learn about the wine making process which defines the reason why the Temecula Valley Wine Country is considered in the top tier of wine producing regions nationally and internationally, and how sewer infrastructure plays a role in its viability. Enjoy lunch with presentations from representatives from Wilson Creek & Vineyard and Eastern Municipal Water District.

**1:30 p.m. - 2:00 p.m. Workshop Opening**

**LOCATION:**  
Olive Ballroom

**SPEAKERS:** Gary Thompson, Executive Officer, Riverside LAFCO; Yxstian Gutierrez, Riverside LAFCO Commissioner; County of Riverside Supervisor

**2:00 p.m. - 3:15 p.m. GENERAL SESSION: Ballots & Boundaries: Navigating the Ins and Outs of LAFCO Protest Hearings and Elections**

**LOCATION:**  
Olive Ballroom

This session will provide an in-depth look at the protest hearing process and election procedures in the context of LAFCO decisions on boundary changes, annexations, consolidations, and other related actions. Participants will learn about the legal requirements, practical steps, and common challenges involved in organizing and managing protest hearings and conducting elections. The session will offer best practices for ensuring compliance with statutory requirements while facilitating transparent and effective public engagement.

**1.25 AICP  
CM Credits**

**MODERATOR/SPEAKER:** Francisco Estrada, Analyst, Santa Cruz LAFCO

**PANELISTS:** Joe Serrano, Executive Officer, Santa Cruz LAFCO; Shannon Costa, Deputy Executive Officer, Butte LAFCO

**3:15 p.m. - 3:30 p.m. Refreshment Break**

**LOCATION:**  
Olive Patio

**3:30 p.m. - 5:00 p.m. GENERAL SESSION: Back to Basics: How Well Do We Know Ourselves and the Law?**

**LOCATION:**  
Olive Ballroom

This interactive session will focus on the fundamental principles of LAFCO such as who we are and what we do; legal exposures of LAFCO and how to reduce risk; our mission and role in managing boundary changes, service provision, and promoting orderly growth; Staying in our lane or tinkering with stuff while under the agency's hood; and assessing whether your staff reports and presentations are complicated.

**1.5 AICP  
CM Credits**

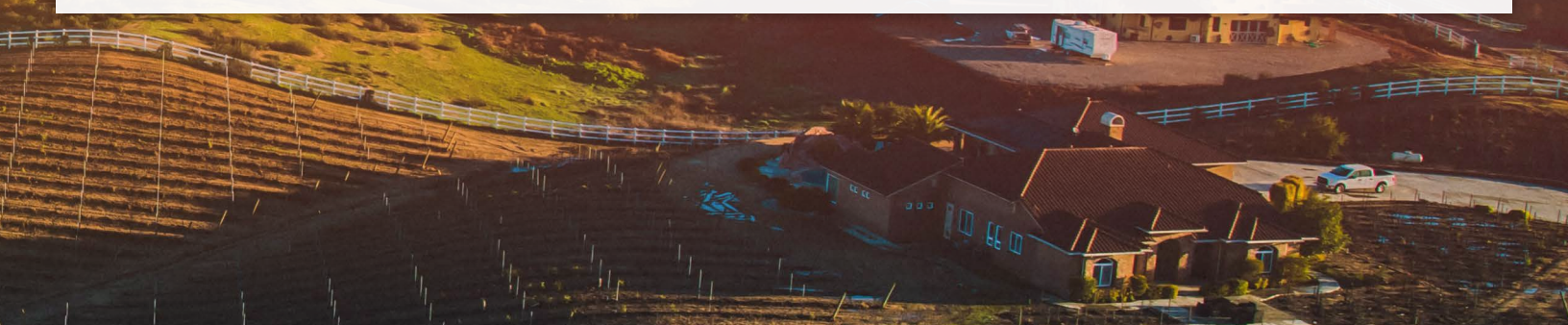
**MODERATOR/SPEAKER:** Michael Tuerpe, Assistant Executive Officer, San Bernardino LAFCO

**PANELISTS:** Samuel Martinez, Executive Officer, San Bernardino LAFCO; Brian Spaunhurst, Executive Officer, Fresno LAFCO; Arturo Pastor, GIS Analyst, San Bernardino LAFCO; Colette Santsche, Partner, Planwest Partners, Inc.; Holly Whatley, Legal Counsel, Colantuono, Highsmith & Whatley, PC

**5:30 p.m. - 7:30 p.m. Welcome Reception**

**LOCATION:**  
Olive Patio

**7:00 p.m. Dinner on Your Own**



# AGENDA

## THURSDAY, MAY 1

**7:00 a.m. - 9:00 a.m. Breakfast Buffet**

LOCATION:  
Olive Patio

**9:00 a.m. - 10:30 a.m. GENERAL SESSION: Tips to Improve the MSR Process**

LOCATION:  
Olive Ballroom

This session will provide practical tips and strategies to improve the Municipal Service Review (MSR) process for LAFCOs. Attendees will explore innovative approaches and will also delve into best practices for conducting MSRs, including optimizing task order, streamlining data collection, and leveraging tools and resources. By the end of this session, participants will gain actionable insights to enhance the effectiveness and efficiency of their MSR processes, ensuring thorough and timely reviews that support informed decision-making.

**1.5 AICP  
CM Credits**

**MODERATOR:** *Krystle Heaney, AICP, Senior Planner, Planwest Partners, Inc.*

**PANELISTS:** *Carol Ieromnimon, Associate, RSG; Joe Serrano, Executive Officer, Santa Cruz LAFCO; Michaela Peters, Local Government Analyst II, San Diego LAFCO, Amanda Ross, CEO, South Fork Consulting, LLC*

**10:30 a.m. - 10:45 a.m. Snack Break**

LOCATION:  
Olive Patio

### BREAKOUT SESSIONS (2 Choices)

**10:45 a.m. - 12:15 p.m. CEQA: Everything You Need to Know Under 90 Minutes**

LOCATION:  
Olive Ballroom

The California Environmental Quality Act (CEQA) requires local government agencies to inform decision makers about the potential environmental impacts of proposed projects. This session will go over what CEQA is, documents required to process LAFCO actions, how to file a Notice of Determination or Notice of Exemption with your local County Clerk Office, and how to upload those documents to the State Clearinghouse.

**1.5 AICP  
CM Credits**

**MODERATOR:** *Doug Dorado, Senior Government Analyst, Los Angeles LAFCO*

**PANELISTS:** *Krystle Heaney, AICP, Senior Planner, Planwest Partners, Inc.; Thomas Hubbard, CEQA Analyst, Governor's Office of Land Use and Climate Innovation; Jaime T. Pailma, Division Manager, Document Recording Division, Los Angeles County Registrar-Recorder/County Clerk*

**10:45 a.m. - 12:15 p.m. Making Sense of SB 938: The Adventure of Del Paso Manor Water District**

LOCATION:  
Sage 3 & 4

Identify and discuss the process of utilizing 2022's SB 938 with the steps that Sacramento LAFCO implemented to successfully build community support and help assist in dissolving a problematic water district. This session will include the recent history of the Del Paso Manor Water District (DPMWD) and the 2021 Sacramento County Grand Jury report that started the discussions.

**1.5 AICP  
CM Credits**

**MODERATOR/PRESENTER:** *José Henriquez, Executive Officer, Sacramento LAFCO*

**12:30 p.m. - 1:30 p.m. Luncheon**

LOCATION:  
Olive Patio

# AGENDA

## THURSDAY, MAY 1 CONTINUED

### BREAKOUT SESSIONS (2 Choices)

**1:45 p.m. - 3:15 p.m.** **Cracking the Code for Island Annexations: Insights, Challenges, and What's Next**

LOCATION:  
Olive Ballroom

Island annexations remain a crucial part of LAFCO's efforts to fulfill its mandate. While the Legislature has provided LAFCOs with additional tools to facilitate island annexation (e.g., a streamlined annexation process), each LAFCO is responsible for charting its own course. The panel will discuss their successful strategies and best practices for island annexations, highlighting innovative approaches, policies, definitions, and valuable lessons learned. They will also address the challenges and limitations they've encountered when navigating LAFCO law, along with their vision for the future of island annexations.

**1.5 AICP  
CM Credits**

**MODERATOR:** Jennifer Stephenson, Executive Officer, Lassen, Modoc, Plumas, and San Benito LAFCOs

**PANELISTS:** Paula de Sousa, Partner, BBK Counsel; Stephen Lucas, Executive Officer, Butte LAFCO; Samuel Martinez, Executive Officer, San Bernardino LAFCO; Dunia Noel, Assistant Executive Officer, Santa Clara LAFCO

**1:45 p.m. - 3:15 p.m.** **Navigating ADA PDF Compliance**

LOCATION:  
Sage 3 & 4

How familiar are you with what it means to have an ADA compliant website? We will be doing a dive into what it means to have your online presence be compliant by showing you a how to on PDF compliance. You will learn the basic needs for your website itself, including things like color contrast, along with getting into the details of what needs to be done with documents you upload to your website. You will also learn what it takes in both time and resources to make this all happen.

**1.5 AICP  
CM Credits**

**MODERATOR/PRESENTER:** Claire Devereux, Clerk/Jr. Policy Analyst, Marin LAFCO

**3:15 p.m. - 3:30 p.m.** **Snack Break**

LOCATION:  
Olive Patio

### BREAKOUT SESSIONS (2 Choices)

**3:30 p.m. - 5:00 p.m.** **Funding the Gap: Enhancing Services and Infrastructure in Disadvantaged Communities**

LOCATION:  
Sage 3 & 4

It has been over 13 years since the Legislature dissolved redevelopment agencies, but it would be a mistake to presume that tax increment financing ("TIF") tools no longer exist in California. In fact, nearly three dozen TIF districts have been created in the past decade – more than in the first 20 years of the "old" redevelopment era.

We will explore nearly a dozen different types of TIF districts that enable agencies to pool funds together for investment in climate resiliency, fire apparatus, infrastructure, and more. You will gain an understanding of how the formation process works, the challenges involved, and how this knowledge can empower you, as a LAFCO, to champion greater investment in these communities.

**1.5 AICP  
CM Credits**

**MODERATOR:** Adriana Romo, Deputy Executive Officer, Los Angeles LAFCO

**PANELISTS:** Jim Simon, Principal, RSG; Suzanne Holland, Director, Riverside County, Office of Economic Development

# AGENDA

## THURSDAY, MAY 1 CONTINUED

**3:30 p.m. - 5:00 p.m. Balancing Growth and Green: LAFCO's Role in the Future of Agriculture**

LOCATION:  
Olive Ballroom

This breakout session will be an opportunity for LAFCO staff to think critically about our role in preserving agriculture and promoting environmental justice; specifically, how LAFCOs can collaborate with other public agencies and carry out grants to do so. Two case studies will be presented: one, involving the City of Ukiah and their collaboration with Mendocino LAFCO to preserve agricultural and open space land, as well as San Diego LAFCO's experience leading two Sustainable Agricultural Land Conservation (SALC) grants that began in 2021 and 2023.

**1.5 AICP  
CM Credits**

**MODERATOR/SPEAKER:** *Michaela Peters, Local Government Analyst II, San Diego LAFCO*

**PANELISTS:** *Meghan Traynor, Local Government Analyst, San Diego LAFCO; Jesse Davis, AICP, Chief Planning Manager, City of Ukiah*

**5:30 p.m. - 7:30 p.m. CALAFCO Dinner**

LOCATION:  
Olive Patio

## FRIDAY, MAY 2

**7:00 a.m. - 9:00 a.m. Breakfast Buffet**

LOCATION:  
Olive Patio

**9:00 a.m. - 12:00 p.m. GENERAL SESSION: Navigating Stormy Waters & Turning the Ship Around - A special Focus Group/Visioning Session**

LOCATION:  
Olive Ballroom

This unique session provides LAFCO staff the opportunity to participate in a focus-group type session and provide input on the future of CALAFCO. We start with a brief Association update from your regional officers, followed by a facilitated visioning and feedback session. This is a chance for you to engage in the cultural and organizational structural review being conducted and contribute ideas for the CALAFCO of the future.

**PRESENTER:** *Pamela Miller, Owner & Chief Engagement Officer, Miller Management & Consulting Group*

**12:00 p.m. Workshop Adjourns**



# Staff Workshop: April 30 – May 2, 2025

California Association of  
Local Agency Formation Commissions



SUPPORTING SUSTAINABLE  
COMMUNITY GROWTH

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**Clark Alsop,**  
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**Jeni Tickler Threadgill,**  
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