



**Local Agency
Formation Commission
of Santa Clara County**

777 North First Street
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San Jose, CA 95112
SantaClaraLAFCO.org

Commissioners

Susan Ellenberg
Sequoia Hall
Sergio Jimenez
Linda J. LeZotte
Rob Rennie
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Yoriko Kishimoto
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Terry Trumbull

Executive Officer
Neelima Palacherla

**FINANCE COMMITTEE MEETING AGENDA
SPECIAL MEETING**

March 13, 2020 • 10:00 AM

LAFCO Conference Room, 777 North First Street, Suite 410, San Jose CA 95112

Finance Committee Members: Sequoia Hall, Linda J. LeZotte, Russ Melton

NOTICE TO THE PUBLIC

1. Pursuant to Government Code §84308, no LAFCO commissioner shall accept, solicit, or direct a contribution of more than \$250 from any party, or his/her agent; or any participant or his /or her agent, while a LAFCO proceeding is pending, and for three months following the date a final decision is rendered by LAFCO. Prior to rendering a decision on a LAFCO proceeding, any LAFCO commissioner who received a contribution of more than \$250 within the preceding 12 months from a party or participant shall disclose that fact on the record of the proceeding. If a commissioner receives a contribution which would otherwise require disqualification returns the contribution within 30 days of knowing about the contribution and the proceeding, the commissioner shall be permitted to participate in the proceeding. A party to a LAFCO proceeding shall disclose on the record of the proceeding any contribution of more than \$250 within the preceding 12 months by the party, or his or her agent, to a LAFCO commissioner. For forms, visit the LAFCO website at www.santaclaralafco.org. No party, or his or her agent and no participant, or his or her agent, shall make a contribution of more than \$250 to any LAFCO commissioner during the proceeding or for 3 months following the date a final decision is rendered by LAFCO.
2. Pursuant to Government Code Sections 56100.1, 56300, 56700.1, 57009 and 81000 et seq., any person or combination of persons who directly or indirectly contribute(s) a total of \$1,000 or more or expend(s) a total of \$1,000 or more in support of or in opposition to specified LAFCO proposals or proceedings, which generally include proposed reorganizations or changes of organization, may be required to comply with the disclosure requirements of the Political Reform Act (See also, Section 84250 et seq.). These requirements contain provisions for making disclosures of contributions and expenditures at specified intervals. More information on the scope of the required disclosures is available at the web site of the FPPC: www.fppc.ca.gov. Questions regarding FPPC material, including FPPC forms, should be directed to the FPPC's advice line at 1-866-ASK-FPPC (1-866-275-3772).
3. Pursuant to Government Code §56300(c), LAFCO adopted lobbying disclosure requirements which require that any person or entity lobbying the Commission or Executive Officer in regard to an application before LAFCO must file a declaration prior to the hearing on the LAFCO application or at the time of the hearing if that is the initial contact. In addition to submitting a declaration, any lobbyist speaking at the LAFCO hearing must so identify themselves as lobbyists and identify on the record the name of the person or entity making payment to them. Additionally, every applicant shall file a declaration under penalty of perjury listing all lobbyists that they have hired to influence the action taken by LAFCO on their application. For forms, visit the LAFCO website at www.santaclaralafco.org.
4. Any disclosable public records related to an open session item on the agenda and distributed to all or a majority of the Commissioners less than 72 hours prior to that meeting are available for public inspection at the LAFCO Office, 777 North First Street, Suite 410, San Jose, California, during normal business hours. (Government Code §54957.5.)
5. In compliance with the Americans with Disabilities Act, those requiring accommodation for this meeting should notify the LAFCO Clerk 24 hours prior to the meeting at (408) 993-4705.

1. PUBLIC COMMENTS

This portion of the meeting is reserved for persons desiring to address the Committee on any matter not on this agenda. Speakers are limited to THREE minutes. All statements that require a response will be referred to staff for reply in writing.

2. COMPREHENSIVE ORGANIZATIONAL ASSESSMENT STUDY: REVIEW OF COMPARATOR AGENCY ANALYSIS

Recommended Action: Accept report and provide direction to Consultant, as necessary, and forward a recommendation to the full Commission.

3. PROPOSED WORK PLAN FOR FISCAL YEAR 2021

Recommended Action: Consider the proposed Work Plan for Fiscal Year 2021, provide further direction to staff, as necessary, and forward a recommendation to the full Commission.

4. PROPOSED BUDGET FOR FISCAL YEAR 2021

Recommended Action: Consider the proposed Budget for Fiscal Year 2021. Provide further direction to staff, as necessary, and forward a recommendation to the full Commission.

5. ADJOURN

Recommended Action: Set date and time for the next Finance Committee meeting, as necessary.

To: Neelima Palacherla, Executive Officer
From: Katie Kaneko, Project Director
Subject: Comparator Agency Analysis for the Comprehensive Organizational Review and Assessment
Date: 03/11/2020

The selection of comparator agencies is an important step in the study process. Koff & Associates (K&A) evaluated several indicators related to the Santa Clara Local Agency Formation Commission (SC LAFCO) demographics, financials, and scope of services to develop a group of agencies to utilize for comparative purposes for this study. The goal of this comparator analysis is to find agencies that are most similar to SC LAFCO operations. The methodology and specific criteria used in the analysis follows.

1. **Organizational type and structure:** K&A generally recommends that agencies of a similar size and structure providing similar services to that of SC LAFCO be used as comparators. Accordingly, we limited our evaluation to other LAFCOs throughout the state. Based on SC LAFCOs demographics, K&A focused on LAFCOs in the greater Bay Area and the CALAFCO Coastal region, as well as LAFCOs in urban counties elsewhere in the state. This focus created an initial list of 21 LAFCOs to evaluate with the goal of selecting 12, the sufficient number of comparator agencies to study for trends and operational considerations.
2. **Staff, Commission membership, operational budgets, and population:** Staff and operational budget size determine the amount of resources available for the agencies to provide services, and population size accounts for the ratio of resources to constituents served. We specifically evaluated data related to population of the county served by each LAFCO, whether there is Special District representation on the Commission, number of full time equivalent staff at each LAFCO, and LAFCO expenditures for FY 19-20. Table 1 includes the raw data for these criteria.
3. **Cost of Living:** Cost of living is the amount of money needed to sustain a standard of living and is a measurement of how expensive it is to live in one area versus another. This factor is important to consider for evaluating compensation competitiveness and regional similarity. Table 1 includes the raw data for this criteria.
4. **Comparable Services / Attributes** Organizations providing similar services are ideal for comparison; given the specialized nature of SC LAFCO's services, we compared the following services and attributes:
 - Use of staffing models – employees of LAFCO or employees of county;
 - Number of commission meetings per year;
 - Number of proposals processed in the last year;
 - Number of Sphere of Influence/Municipal Service Reviews conducted in the last five years;
 - History of involvement in lawsuits;
 - Number of times LAFCO featured in a local news story in the last two years.

Table 2 captures data for the above listed criteria from the 2019 CALAFCO Biennial Survey for each LAFCO. Further, in Table 2, each potential comparator agency is ranked (using the absolute value ranking system) on the overall similarity to SC LAFCO based on the above six criteria.

There were 21 LAFCOs compared to SC LAFCO in this analysis. An absolute value ranking assigns a numerical value to each agency's relative position to SC LAFCO, in the 22 agency array. In situations where multiple agencies received the same ranking in a specific criteria, they received the same ranking score and the next score assigned will reflect the next available position within the 22 positions. For example, there were 17 LAFCO agencies that had special district representation on the board. All 17 of these agencies received a ranking score of 1, aligned with SC LAFCO. There were 5 LAFCOs that did not have special district representation and since the first 17 positions in the array were taken, the next ranking was 18, and the five agencies that did not have special district representation received this score, since they were all tied.

Table 3 presents the agency ranking of each criteria in comparison to SC LAFCO. Ranking is based on the absolute value difference between the agency and SC LAFCO on each criteria regardless of whether the agency's data is higher or lower for that factor. Each agency's Overall Comparison Score is a sum total of the individual criteria scores. Lower Overall Comparison Scores indicate a greater similarity to the SC LAFCO. The Overall Rank is based on the absolute value difference between the agency's Overall Comparison Score and SC LAFCO.

Based on this analysis, the top ranked LAFCOs are:

- Sonoma LAFCO
- Alameda LAFCO
- San Bernardino LAFCO
- Riverside LAFCO
- Ventura LAFCO
- Orange LAFCO
- Sacramento LAFCO
- Monterey LAFCO
- San Mateo LAFCO
- Marin LAFCO
- Contra Costa LAFCO
- San Luis Obispo LAFCO
- San Diego LAFCO
- Santa Barbara LAFCO

The top ranked comparators are highlighted in green on Table 3.

This analysis is intended to assist in choosing the comparator group. However, SC LAFCO should reflect on other factors that apply to their labor market that could potentially override these quantitative considerations. Other factors that are often considered are recruitment, retention, and/or alignment of operations. The goal is to choose 12 comparator agencies for this survey, generally utilizing those agencies with similar profiles with consideration of swapping in other agencies for which there is strong

competitive rationale to include as part of the labor market. In this case, San Luis Obispo has a slightly better score than San Diego or Santa Barbara but there are significant differences in the size of the population served and cost of living compared to SC LAFCO. K&A has carefully reviewed the individual factors related to this analysis and since the overall ranking scores for San Luis Obispo, Santa Barbara, and San Diego are so close, we recommends that SC LAFCO select San Diego LAFCO, rather than San Luis Obispo or Santa Barbara LAFCOs because of its alignment to SC LAFCOs densely populated urban environment, which is a factor that has significant influence on operations. The inclusion of San Diego instead of San Luis Obispo would mean that the comparator group would remain the same as originally approved in February and it is our recommendation to continue the study utilizing this group.¹

Attachments:

Table 1: Raw Data

Table 2: Comparable Services / Attributes

Table 3: Criteria Comparison Scores and Overall Ranking

¹ Changes in our Comparable Services scoring on Table 2, caused the original rankings to slightly change. The original analysis scored San Diego and San Luis Obispo LAFCO as a tie at the #12 ranking, and San Diego was recommended by K&A and chosen over San Luis Obispo by the Finance Commission.

Table 1: Raw Data

Agency	County	Special Districts Represented ¹	Population ²	FTE ³	Agency Expenditures ⁴	% above or below U.S Cost of Living Average Index of 100% ⁵
Santa Clara LAFCO	Santa Clara	1	1,954,286	4	\$1,294,158	81.6%
Alameda LAFCO	Alameda	1	1,669,301	3	\$576,381	66.2%
Contra Costa LAFCO	Contra Costa	1	1,155,879	2	\$996,415	41.9%
Fresno LAFCO	Fresno	0	1,018,241	5	\$587,979	2.7%
Los Angeles LAFCO	Los Angeles	1	10,253,716	7	\$1,625,603	76.6%
Marin LAFCO	Marin	1	262,879	3	\$647,928	61.3%
Napa LAFCO	Napa	0	140,779	3	\$557,376	43.5%
Orange LAFCO	Orange	1	3,222,498	5	\$1,258,650	42.9%
Riverside LAFCO	Riverside	1	2,440,124	5	\$1,436,824	22.5%
Sacramento LAFCO	Sacramento	1	1,546,174	2	\$1,003,128	22.2%
San Bernardino LAFCO	San Bernardino	1	2,192,203	5	\$1,337,454	12.2%
San Diego LAFCO	San Diego	1	3,351,786	7	\$1,906,694	68.4%
San Francisco LAFCO	San Francisco	0	883,869	1	\$297,342	136.6%
San Mateo LAFCO	San Mateo	1	774,485	3	\$614,469	83.5%
Santa Cruz LAFCO	Santa Cruz	1	276,071	2	\$662,400	58.8%
Solano LAFCO	Solano	0	441,307	2	\$697,726	28.1%
Sonoma LAFCO	Sonoma	1	500,675	4	\$796,055	43.6%
Ventura LAFCO	Ventura	1	856,598	3	\$830,225	41.6%
Monterey LAFCO	Monterey	1	445,414	5	\$1,014,460	19.3%
Santa Barbara LAFCO	Santa Barbara	1	454,593	2	\$385,750	55.9%
San Benito LAFCO	San Benito	0	62,296	2	\$141,497	25.6%
San Luis Obispo LAFCO	San Luis Obispo	1	280,393	3	\$671,625	33.9%

Footnotes

This table shows the raw data for each comparison factor.

- 1 - Special Districts Representation on LAFCO Board: 1 = Yes, 0 = No. Data from 2019 CALAFCO Biennial Survey
- 2 - Population of County served; data from State of California Demographic Research Unit (<http://www.dof.ca.gov/Forecasting/Demographics/Estimates/E-1/>)
- 3 - Number of full-time equivalent employees for each LAFCO. Data from agency websites.
- 4 - Agency annual expenditures for FY19-20. Data from agency websites.
- 5 - Percent above or below U.S Cost of Living Average Index of 100% for location of LAFCO office. Data from Economic Research Institute Geographic Assessor /U.S. National Average

Table 2: Comparable Services/ Attributes

Agency	County Employee Model ¹	History of Lawsuits ²	# Meetings per Year ³	# Proposals ⁴	#SOI/MSR Updates ⁵	# Media Mentions ⁶	Comparable Services Score ⁷	Difference from Agency ⁸	Ranking
Santa Clara LAFCO	1	1	1	1	1	1	6	0	1
Alameda LAFCO	1	2	1	1	3	4	12	6	8
Contra Costa LAFCO	2	1	2	2	4	3	14	8	15
Fresno LAFCO	2	2	3	2	1	4	14	8	15
Los Angeles LAFCO	2	2	3	3	2	1	13	7	10
Marin LAFCO	2	2	1	1	3	3	12	6	8
Napa LAFCO	1	2	1	1	2	3	10	4	3
Orange LAFCO	2	2	3	2	4	3	16	10	18
Riverside LAFCO	2	1	2	1	3	4	13	7	10
Sacramento LAFCO	2	1	2	1	1	2	9	3	2
San Bernardino LAFCO	2	1	2	2	3	3	13	7	10
San Diego LAFCO	2	1	3	3	3	1	13	7	10
San Francisco LAFCO	2	2	2	2	4	3	15	9	17
San Mateo LAFCO	1	2	1	1	3	3	11	5	6
Santa Cruz LAFCO	2	2	3	2	4	4	17	11	19
Solano LAFCO	2	2	1	1	4	3	13	7	10
Sonoma LAFCO	1	2	2	1	3	1	10	4	3
Ventura LAFCO	1	2	2	1	1	4	11	5	6
Monterey LAFCO	2	1	2	1	3	3	10	4	3
Santa Barbara LAFCO	2	2	2	1	1	3	9	3	2
San Benito LAFCO	1	2	1	1	4	1	9	3	2
San Luis Obispo LAFCO	2	1	2	2	3	4	12	6	8

Footnotes

This table compares organizational structure, workload, and services provided by each LAFCO. Data is from the 2019 CALAFCO Biennial Survey.

1- Are staff employees of LAFCO or employees of the county? **1 = employees of the county, 2 = employees of LAFCO**

2 - Does the LAFCO have any history of involvement in lawsuits? **1 = yes, 2 = no**

3 - Number of times LAFCO Board meets per Year (in comparison to Santa Clara LAFCO): **5-8 times (Santa Clara LAFCO) = 1, 9-11 times = 2, 12 times = 3**

4 - Number of Proposals processed in the last year (in comparison to Santa Clara LAFCO): **6-15 (Santa Clara LAFCO) = 1, 16-25 = 2, 0-5 = 2, 26 or more = 3**

5 - Number of Sphere Of Influence/Municipal Service Review Updates processed in the last 5 years (inc comparison to Santa Clara LAFCO): **26 or more (Santa Clara LAFCO) = 1, 16-25 = 2, 6-15 = 3, 0-5 = 4**

6 - Number of times LAFCO featured in the media in the last two years (in comparison to Santa Clara LAFCO): **10 or more (Santa Clara LAFCO) = 1, 8-10 = 2, 4-7 = 3, 0-3= 4**

7 - This column is the sum total of all the values.

8 - This column reflects the difference between each agency's score and Santa Clara LAFCO; a lower difference means the agency is closer in organizational structure to SC LAFCO.

9 - This column shows the ranking for each agency in comparison to SC LAFCO.

Table 3: Criteria Comparison Scores and Overall Ranking

Agency	Special Districts Represented ¹	Population ²	FTE ³	Agency Expenditures ⁴	% above or below U.S Cost of Living Average Index of 100% ⁵	Comparable Services ⁶	Overall Criteria Comparison Score	Overall Rank
Santa Clara LAFCO	1	1	1	1	1	1	6	1
Alameda LAFCO	1	3	3	18	5	8	38	3
Contra Costa LAFCO	1	6	14	7	12	15	55	12
Fresno LAFCO	18	7	3	17	22	15	82	19
Los Angeles LAFCO	1	22	20	8	3	10	64	16
Marin LAFCO	1	19	3	15	6	8	52	11
Napa LAFCO	18	20	3	19	10	3	73	17
Orange LAFCO	1	11	3	2	11	18	46	7
Riverside LAFCO	1	5	3	4	18	10	41	5
Sacramento LAFCO	1	4	14	6	19	2	46	7
San Bernardino LAFCO	1	2	3	3	21	10	40	4
San Diego LAFCO	1	12	20	12	4	10	59	14
San Francisco LAFCO	18	8	20	21	16	17	100	22
San Mateo LAFCO	1	10	13	16	2	6	48	10
Santa Cruz LAFCO	1	18	14	14	7	19	73	17
Solano LAFCO	18	16	14	11	15	10	84	20
Sonoma LAFCO	1	13	1	10	9	3	37	2
Ventura LAFCO	1	9	3	9	13	6	41	5
Monterey LAFCO	1	15	3	5	20	3	47	9
Santa Barbara LAFCO	1	14	14	20	8	2	59	14
San Benito LAFCO	18	21	14	22	17	2	94	21
San Luis Obispo LAFCO	1	17	3	13	14	8	56	13

Footnotes

This table shows the absolute value ranking for each comparison factor by agency in comparison to Santa Clara LAFCO.

- 1 - Special Districts Representation on LAFCO
- 2 - Population of county served
- 3 - Number of full-time equivalent employees for each LAFCO
- 4 - Agency annual expenditures for FY19-20
- 5 - Percent above or below U.S Cost of Living Average Index of 100% for location of LAFCO office
- 6 - Comparable Services ranking for each LAFCO is from Table 2: Comparable Services / Attributes
- 7 -The Overall Comparison Score is the sum of the six criteria score for each LAFCO.
- 8 - Overall ranking for each LAFCO in comparison to Santa Clara LAFCO.

FY 2020 IN REVIEW: WORK PLAN STATUS

	PROJECTS	STATUS
LAFCO APPLICATIONS	Process applicant initiated LAFCO proposals	Ongoing, as needed
	Comment on potential LAFCO applications, relevant projects & development proposals, city General Plan updates and/ or related environmental documents	Ongoing, as needed
	Comprehensive review and update of LAFCO policies and procedures for clarity and consistency with State law	In progress
ISLAND ANNEXATIONS	Conduct outreach to cities with islands, follow up on responses including review/research of city limits/ USA boundaries, provide assistance with potential annexations and potential USA amendments	Ongoing, as needed Los Gatos Islands
	Review and finalize city-conducted island annexations	Ongoing, as needed
PUBLIC OUTREACH & COMMUNICATION	Implement LAFCO's Public Communications and Outreach Plan: develop new communication material (map, brochure, factsheets, powerpoint presentations, public exhibits) & tools (social media, website) and conduct outreach to increase awareness of LAFCO's role	Completed. Ongoing outreach in progress
	Engage and establish relationships with local (cities, districts, county), regional (ABAG/MTC), state (SGC, OPR, DoC, SWRCB) agencies, organizations such as SDA, SCCAPO, CALAFCO, other stakeholder groups	Ongoing
	Respond to public enquiries re. LAFCO policies, procedures and application filing requirements	Ongoing, as needed
SERVICE REVIEWS & SPHERE OF INFLUENCE UPDATES	Develop a plan, strategies and priorities for conducting the third round of service reviews	Completed, TBD
	Begin conducting LAFCO's 3 rd round of service reviews & special studies	RRRPD Study in progress
	Continue to monitor implementation of recommendations from previous service reviews, as necessary	Ongoing
	Map Mutual Water companies	TBD
	Engage in SALC grant partnership opportunities	TBD
	Compile and post JPA filings on the LAFCO website	TBD
ADMINISTRATIVE PROJECTS	Prepare LAFCO annual work plan and budget	In progress
	Prepare LAFCO Annual Report	August 2019
	Prepare LAFCO Annual Financial Audit	Completed
	Review and update LAFCO administrative policies and procedures	Ongoing
	Conduct a Strategic Planning Workshop for LAFCO	TBD
	Maintain and enhance the LAFCO Website	Redesign complete
	Maintain LAFCO database	Ongoing
	Maintain LAFCO's hard copy and digital records, organize scan of LAFCO records to its Electronic Document Management System (LaserFische)	Ongoing, TBD
	Staff and Commissioner training and development (orientation, CALAFCO events, workshops, conferences, relevant courses)	Ongoing
	Staff performance evaluation	April -June 2020
	LAFCO Agenda management software and LAFCO meeting broadcast	In progress
	Comprehensive Organizational Assessment Study	In progress
	Track LAFCO related legislation (CALAFCO Leg. Committee)	Ongoing
	Other administrative functions mandated of a public agency	Ongoing

PROPOSED WORK PLAN FOR FISCAL YEAR 2021

	PROJECT DESCRIPTION	TIME FRAME	RESOURCES
LAFCO APPLICATIONS	Process applicant initiated LAFCO proposals	Ongoing, as needed	Staff
	Comment on potential LAFCO applications, relevant projects & development proposals, city General Plan updates and/ or related environmental documents	Ongoing, as needed	Staff
	Review and update LAFCO policies and procedures for clarity and consistency with State law	Ongoing	Staff / Consultant
ISLAND ANNEXATIONS	Conduct outreach to cities with islands, follow up on responses including review/research of city limits/ USA boundaries, provide assistance with potential annexations and potential USA amendments	Ongoing, as needed	Staff
	Review and finalize city-conducted island annexations	Ongoing, as needed	Staff
PUBLIC OUTREACH & COMMUNICATIONS	Conduct outreach to increase awareness of LAFCO's role	In progress	Staff
	Engage and establish relationships with local (cities, districts, county), regional (ABAG/MTC), state (SGC, OPR, DoC, SWRCB) agencies, organizations such as SDA, SCCAPO, CALAFCO, other stakeholder groups	Ongoing	Staff
	Respond to public enquiries re. LAFCO policies, procedures and application filing requirements	Ongoing, as needed	Staff
SERVICE REVIEWS & SPHERE OF INFLUENCE UPDATES	Continue conducting LAFCO's third round of service reviews and special studies	Ongoing	Staff / Consultant
	Continue to monitor implementation of recommendations from previous service reviews, as necessary	Ongoing	Staff
	Map Mutual Water companies	TBD	Staff
	Engage in SALC grant partnership opportunities	TBD	Staff
	Compile and post JPA filings on the LAFCO website	TBD	Staff
ADMINISTRATIVE/ OTHER PROJECTS	Prepare LAFCO annual work plan and budget	March – June	Staff
	Prepare LAFCO Annual Report	August 2020	Staff
	Prepare LAFCO Annual Financial Audit	August 2020	Consultant / Staff
	Review and update LAFCO administrative policies and procedures	Ongoing	Staff
	Conduct a Strategic Planning Workshop for LAFCO	TBD	Staff / Consultant
	Maintain and enhance the LAFCO Website	Ongoing	Staff
	Maintain LAFCO database	Ongoing	Staff
	Maintain LAFCO's hard copy and digital records,	Ongoing	Staff
	Scan LAFCO records into LaserFische	TBD	Staff / Consultant
	Staff and Commissioner training and professional development (orientation, CALAFCO workshops, conferences, relevant courses)	Ongoing	Staff/Commission
	Staff performance evaluation	April -June	Staff/Commission
	Track LAFCO related legislation (CALAFCO Leg. Committee)	Ongoing	Staff
	Other administrative functions mandated of a public agency	Ongoing	Staff

FY 2008 - FY 2019 LAFCO FINANCIALS

March 2020

ITEM NO. TITLE	ACTUALS FY 2008	ACTUALS FY 2009	ACTUALS FY 2010	ACTUALS FY 2011	ACTUALS FY 2012	ACTUALS FY 2013	ACTUALS FY 2014	ACTUALS FY 2015	ACTUALS FY 2016	ACTUALS FY 2017	ACTUALS FY 2018	ACTUALS FY 2019	APPROVED BUDGET FY 2019
EXPENDITURES													
Salary and Benefits	\$356,009	\$400,259	\$406,650	\$413,966	\$393,194	\$411,929	\$450,751	\$466,755	\$484,216	\$514,381	\$628,534	\$713,900	\$720,316
Object 2: Services and Supplies													
5255100 Intra-County Professional	\$66,085	\$57,347	\$13,572	\$4,532	\$6,118	\$5,260	\$5,663	\$4,379	\$18,523	\$1,292	\$703	\$3,593	\$45,000
5255800 Legal Counsel	\$0	\$9,158	\$67,074	\$52,440	\$48,741	\$56,791	\$53,550	\$52,854	\$57,498	\$71,131	\$59,400	\$72,276	\$70,200
5255500 Consultant Services	\$19,372	\$75,000	\$76,101	\$58,060	\$102,349	\$59,563	\$35,602	\$37,250	\$39,625	\$0	\$45,000	\$52,650	\$100,000
5285700 Meal Claims	\$0	\$368	\$277	\$288	\$379	\$91	\$228	\$209	\$367	\$50	\$901	\$257	\$750
5220100 Insurance	\$491	\$559	\$550	\$4,582	\$4,384	\$4,378	\$4,231	\$4,338	\$4,135	\$4,679	\$4,893	\$5,296	\$6,000
5250100 Office Expenses	\$1,056	\$354	\$716	\$639	\$1,212	\$536	\$850	\$783	\$6,266	\$48,632	\$15,412	\$4,702	\$10,000
5270100 Rent and Lease											\$41,120	\$39,360	\$42,764
5255650 Data Processing Services	\$8,361	\$3,692	\$3,505	\$1,633	\$3,384	\$1,663	\$3,311	\$9,024	\$1,519	\$6,869	\$877	\$11,894	\$5,068
5225500 Commissioners' Fee	\$5,700	\$5,400	\$3,500	\$3,400	\$4,000	\$4,900	\$5,800	\$4,900	\$6,700	\$5,300	\$5,400	\$5,000	\$10,000
5260100 Publications and Legal Notices	\$1,151	\$563	\$1,526	\$363	\$916	\$222	\$378	\$2,484	\$487	\$191	\$145	\$192	\$2,500
5245100 Membership Dues	\$5,500	\$7,000	\$7,000	\$7,000	\$7,000	\$14,473	\$0	\$7,428	\$7,577	\$8,107	\$8,674	\$9,615	\$8,926
5250750 Printing and Reproduction	\$5	\$0	\$0	\$0	\$0	\$0	\$9	\$177	\$703	\$0	\$0	\$0	\$1,500
5285800 Business Travel	\$7,238	\$8,415	\$4,133	\$8,309	\$3,095	\$4,777	\$5,800	\$4,042	\$5,811	\$3,877	\$13,091	\$4,260	\$16,000
5285300 Private Automobile Mileage	\$1,016	\$704	\$832	\$1,185	\$615	\$424	\$409	\$396	\$1,009	\$1,264	\$590	\$689	\$2,000
5285200 Transportation & Travel (County Car U	\$894	\$948	\$629	\$0	\$384	\$250	\$371	\$293	\$559	\$605	\$0	\$328	\$605
5281600 Overhead	\$42,492	\$62,391	\$49,077	\$46,626	\$60,647	\$43,133	\$42,192	\$34,756	\$49,452	\$0	\$28,437	\$69,944	\$79,368
5275200 Computer Hardware	\$0	\$451	\$0	\$83	\$2,934	\$1,791	\$2,492	\$0	\$106	\$0	\$0	\$773	\$3,000
5250800 Computer Software	\$0	\$0	\$626	\$314	\$579	\$3,124	\$933	\$1,833	\$2,079	\$754	\$4,505	\$3,012	\$4,000
5250250 Postage	\$1,160	\$416	\$219	\$568	\$309	\$589	\$246	\$597	\$411	\$209	\$183	\$117	\$2,000
5252100 Staff Training Programs	\$0	\$665	\$491	\$250	\$300	\$0	\$0	\$1,431	\$0	\$0	\$0	\$350	\$2,000
5701000 Reserves	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL EXPENDITURES	\$516,530	\$633,691	\$636,478	\$604,238	\$640,540	\$613,895	\$612,816	\$633,929	\$687,043	\$667,342	\$857,865	\$998,208	\$1,131,997
REVENUES													
4103400 Application Fees	\$46,559	\$41,680	\$35,576	\$48,697	\$37,426	\$45,458	\$63,561	\$27,386	\$146,168	\$20,436	\$29,864	\$33,049	\$35,000
4301100 Interest: Deposits and Investments	\$24,456	\$16,230	\$6,688	\$4,721	\$4,248	\$3,416	\$2,674	\$2,844	\$6,073	\$10,830	\$12,620	\$12,141	\$4,000
3400150 Fund Balance from Previous FY	\$271,033	\$368,800	\$334,567	\$275,605	\$209,987	\$208,219	\$160,052	\$226,111	\$187,310	\$293,489	\$331,177	\$314,693	\$259,171
TOTAL REVENUE	\$342,048	\$426,711	\$376,831	\$329,023	\$251,661	\$257,092	\$226,287	\$256,341	\$339,551	\$324,755	\$373,661	\$359,883	\$298,171
NET LAFCO OPERATING EXPENSES	\$174,482	\$206,980	\$259,648	\$275,215	\$388,879	\$356,802	\$386,529	\$377,588	\$347,492	\$342,587	\$484,204	\$638,325	\$833,826
3400800 RESERVES AVAILABLE				\$100,000	\$100,000	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000
COSTS TO AGENCIES													
5440200 County	\$271,641	\$270,896	\$267,657	\$292,601	\$298,597	\$281,780	\$156,002	\$187,521	\$220,668	\$225,778	\$266,298	\$277,942	\$277,942
4600100 Cities (San Jose 50% +other cities 50%)	\$271,641	\$270,896	\$267,657	\$292,601	\$298,597	\$282,625	\$156,002	\$187,521	\$220,668	\$225,778	\$266,298	\$277,942	\$277,942
4600100 Special Districts							\$296,892	\$187,521	\$220,668	\$225,778	\$266,298	\$277,942	\$277,942

**PROPOSED LAFCO BUDGET
FISCAL YEAR 2020- 2021**

ITEM # TITLE	APPROVED FY 2020 BUDGET	ACTUALS Year to Date 3/10/2020	PROJECTIONS Year End 2020	PROPOSED FY 2021 BUDGET
EXPENDITURES				
Object 1: Salary and Benefits	\$772,591	\$475,304	\$732,000	\$806,845
Object 2: Services and Supplies				
5255100 Intra-County Professional	\$45,000	\$346	\$5,000	\$45,000
5255800 Legal Counsel	\$72,240	\$35,235	\$70,000	\$74,622
5255500 Consultant Services	\$110,000	\$89,922	\$110,000	\$110,000
5285700 Meal Claims	\$750	\$166	\$400	\$750
5220100 Insurance	\$6,000	\$5,893	\$6,000	\$6,000
5250100 Office Expenses	\$10,000	\$1,481	\$5,000	\$10,000
5270100 Rent & Lease	\$44,478	\$33,138	\$44,478	\$46,254
5255650 Data Processing Services	\$14,825	\$10,355	\$14,825	\$20,267
5225500 Commissioners' Fee	\$10,000	\$3,000	\$7,000	\$10,000
5260100 Publications and Legal Notices	\$2,500	\$0	\$200	\$2,500
5245100 Membership Dues	\$11,836	\$11,822	\$11,822	\$12,000
5250750 Printing and Reproduction	\$1,500	\$799	\$1,000	\$1,500
5285800 Business Travel	\$16,650	\$7,910	\$10,000	\$12,000
5285300 Private Automobile Mileage	\$2,000	\$637	\$1,000	\$2,000
5285200 Transportation&Travel (County Car Usage)	\$605	\$256	\$500	\$605
5281600 Overhead	\$61,183	\$30,591	\$61,183	\$167,019
5275200 Computer Hardware	\$3,000	\$0	\$1,000	\$3,000
5250800 Computer Software	\$5,000	\$0	\$2,000	\$5,000
5250250 Postage	\$2,000	\$71	\$500	\$2,000
5252100 Staff/Commissioner Training Programs	\$2,000	\$525	\$1,000	\$2,000
5701000 Reserves	\$100,000	\$0	\$0	\$0
TOTAL EXPENDITURES	\$1,294,158	\$707,451	\$1,084,908	\$1,339,362
REVENUES				
4103400 Application Fees	\$35,000	\$7,585	\$15,000	\$30,000
4301100 Interest: Deposits and Investments	\$6,000	\$9,203	\$10,000	\$6,000
TOTAL REVENUE	\$41,000	\$16,788	\$25,000	\$36,000
3400150 FUND BALANCE FROM PREVIOUS FY	\$107,446	\$202,123	\$202,123	\$187,927
NET LAFCO OPERATING EXPENSES	\$1,145,712	\$488,540	\$857,785	\$1,115,435
3400800 RESERVES Available	\$150,000	\$250,000	\$250,000	\$250,000
COSTS TO AGENCIES				
5440200 County	\$381,904	\$381,904	\$381,904	\$371,812
4600100 Cities (San Jose 50% + Other Cities 50%)	\$381,904	\$381,904	\$381,904	\$371,812
4600100 Special Districts	\$381,904	\$381,904	\$381,904	\$371,812