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September 11, 2019 (Agenda)

Contra Costa Local Agency Formation Commission
651 Pine Street, Sixth Floor
Martinez, CA 94553

Sept 11, 2019
Agenda Item 8

**Requests for Proposals – 2nd Round “Parks & Recreation Services”
Municipal Service Review and Sphere of Influence Updates**

Dear Commissioners:

BACKGROUND

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (CKH Act) requires that every five years, as necessary, LAFCO review and update the sphere of influence (SOI) of each local agency. As part of the SOI update, LAFCO must prepare a corresponding Municipal Service Review (MSR) to evaluate projected growth/population; financial ability of the agencies to provide services; status of, and opportunities for, shared services; present and planned capacity of public facilities and adequacy of public services, infrastructure needs and deficiencies; characteristics and service needs of disadvantaged unincorporated communities (DUCs); and any other issues related to the effective and efficient delivery of municipal services as determined by the Commission.

In April 2013, Contra Costa LAFCO completed its inaugural MSR cycle and the comprehensive review of all 19 cities and 76 special districts and corresponding SOI updates for most agencies. In accordance with the CKH Act, LAFCO initiated its 2nd round MSRs/SOI updates. To date, LAFCO has completed 2nd round MSRs covering water/wastewater services (2014); reclamation (levee) services (2015), Fire/EMS (2016), healthcare (2018) and “city services: covering all 19 cities and four community services districts (2019).

DISCUSSION

As part of the FY 2019-20 work plan and budget, the Commission approved preparing a 2nd round MSR covering *parks & recreation services*. This MSR will focus on park & recreation services provided by the cities, dependent districts (County Service Areas - CSAs) and independent districts including parks & recreation districts (RPDs) and community services districts (CSDs) as listed in the table below.

• City of Antioch*	• City of Pinole*	• CSA R-7
• City of Brentwood*	• City of Pittsburg*	• CSA R-9
• City of Clayton*	• City of Pleasant Hill*	• CSA R-10
• City of Concord*	• City of Richmond*	• Ambrose RPD
• Town of Danville*	• City of San Pablo*	• East Bay Regional Park District*
• City of El Cerrito*	• City of San Ramon*	• Green Valley RPD
• City of Hercules*	• City of Walnut Creek*	• Pleasant Hill RPD
• City of Lafayette*	• CSA M-16	• Crockett CSD*
• City of Martinez*	• CSA M-17	• Diablo CSD*
• Town of Moraga*	• CSA M-29	• Town of Discovery Bay CSD*
• City of Oakley*	• CSA M-30	• Kensington Police Protection & CSD*
• City of Orinda*	• CSA R-4	

*No SOI update

As proposed, the 2nd round parks & recreation services MSR will focus on the following:

- ❖ Updating profile data including growth and population, finances (expenses, revenues, debt, reserves, rates/fee schedules, other fiscal indicators), staffing
- ❖ Capacity of public services, programs and facilities; service to disadvantaged communities
- ❖ Shared services/facilities and collaboration
- ❖ Accountability, structure and efficiencies
- ❖ Governance structure options

Request for Proposals (RFP), Scope of Services, Selection Process and Timeline - Staff has prepared a draft RFP (Attachment 1) and Scope of Services (Attachment 2) for the Commission's consideration.

The scope of services will address the MSR and SOI factors and focus areas. The MSR will also include a review and update of the SOIs, excluding the SOIs of those agencies that were covered in the 2019 "City Services" MSR as well as East Bay Regional Park District (Alameda LAFCO is principal LAFCO) as noted in the table above.

Regarding the proposed selection process, as with previous MSRs, LAFCO staff proposes to establish a selection committee to help review and screen the written proposals, conduct the interviews, and make a recommendation. The selection committee will include LAFCO and/or other municipal service professionals.

The review of proposals will include an assessment of written proposals, followed by interviews with the most qualified firms. Written proposals will be evaluated based on various criteria including, but not limited to, experience and qualifications of the firm, understanding of the required tasks, approach to conducting MSRs/SOI updates, experience and familiarity with

LAFCO, qualifications of personnel who would be assigned to work with the Contra Costa LAFCO, and cost.

Following an assessment of the written proposals, the most qualified candidates will be invited to participate in an interview. Following the interviews, a summary of proposals and a recommendation will be presented to the Commission in accordance with the proposed timeline as shown in the RFP.

Staff have compiled a list of potential bidders. A notice regarding the RFP will be sent to these firms. In addition, we propose posting the RFP on the Contra Costa LAFCO, CALAFCO, and CSDA websites (no cost).

FINANCING

Adequate funding is included in the FY 2019-20 budget to cover the anticipated costs associated with the “*parks & recreation services*” services MSR/SOI updates.

RECOMMENDATIONS

1. Provide input;
2. Authorize the circulation of the RFP for the 2nd round *parks & recreation services* MSR/SOI updates; and
2. Direct staff to return to the Commission with a recommended contract award in accordance with the proposed timeline.

Sincerely,

LOU ANN TEXEIRA
EXECUTIVE OFFICER

Attachments

1. Draft RFP – 2nd Round Parks & Recreation Services MSR/SOI Updates (with Attachments A & B)
2. Draft Scope of Services – 2nd Round Parks & Recreation Services MSR/SOI Updates

Attachment 1

REQUEST FOR PROPOSALS FOR 2ND ROUND PARKS & RECREATION SERVICES MUNICIPAL SERVICE REVIEW/ SPHERE OF INFLUENCE UPDATES

The Contra Costa Local Agency Formation Commission (LAFCO) is seeking proposals from qualified consultants to prepare a 2nd round municipal service review and sphere of influence updates.

REQUEST FOR PROPOSALS

2nd Round Parks & Recreation Services

Municipal Service Review/Sphere of Influence Updates

I. Objective

LAFCO seeks proposals from professional consulting firms to prepare a 2nd round municipal service review (MSR) and sphere of influence (SOI) updates covering parks & recreation services in Contra Costa County.

The work is to be completed in compliance with applicable California Government Code provisions (Attachment A) and Contra Costa LAFCO MSR guidelines (Attachment B).

An MSR is a comprehensive review of municipal services in a designated geographic area which provides information and evaluates the provision of services, and recommends actions when necessary, to promote the efficient provision of those services. MSRs are intended to serve as tools to help LAFCO, local agencies and the public better understand the municipal service structure and to develop information to update the SOIs of cities and special districts in the county.

LAFCO uses MSRs to review the provision and adequacy of municipal services; local agency transparency and accountability such as maintaining comprehensive financial records, preparing and submitting timely audits, adopting capital improvement and other long-range plans; evaluating agencies' performance; customer outreach and education; and other factors. MSRs are also used to evaluate potential governance structure options for local agencies, such a consolidation, merger, and dissolution. LAFCO is not required to initiate boundary or governance changes based on MSRs; however, LAFCO, local agencies and the public may use MSRs, together with additional research and analysis where necessary, to pursue changes in organization and jurisdictional boundaries.

II. Background

In 1963, the State Legislature created LAFCOs to help direct and coordinate California's growth in a logical, efficient and orderly manner. Each of the 58 counties in California has a LAFCO. LAFCOs are charged with discouraging urban sprawl, encouraging orderly boundaries and formation of local agencies, preserving agricultural and open space lands, and regulating the extension of services outside jurisdictional boundaries.

In 2001, pursuant to the enactment of the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 ("CKH Act"; Government Code §56000 et seq.), LAFCO acquired responsibility for preparing MSRs. On or before January 1, 2008, and every five years thereafter, LAFCO shall, as necessary, review and update the SOI for each local agency. In conjunction with the SOI updates, LAFCO shall prepare corresponding MSRs.

Contra Costa LAFCO is responsible for reviewing and updating SOIs for 92 local agencies in Contra Costa County (19 cities and 73 special districts). In 2013, Contra Costa LAFCO completed its inaugural MSR cycle, and is currently working on 2nd round reviews. All Contra Costa LAFCO MSRs are available online at http://www.contracostalafco.org/municipal_service_reviews.htm.

IV. Scope of Services

This project consists of reviewing parks & recreation services for the agencies listed in the table below. SOI updates will be prepared only for the CSAs and park & recreation as indicated below.

• City of Antioch*	• City of Pinole*	• CSA R-7
• City of Brentwood*	• City of Pittsburg*	• CSA R-9
• City of Clayton*	• City of Pleasant Hill*	• CSA R-10
• City of Concord*	• City of Richmond*	• Ambrose RPD
• Town of Danville*	• City of San Pablo*	• East Bay Regional Park District*
• City of El Cerrito*	• City of San Ramon*	• Green Valley RPD
• City of Hercules*	• City of Walnut Creek*	• Pleasant Hill RPD
• City of Lafayette*	• CSA M-16	• Crockett CSD*
• City of Martinez*	• CSA M-17	• Diablo CSD*
• Town of Moraga*	• CSA M-29	• Town of Discovery Bay CSD*
• City of Oakley*	• CSA M-30	• Kensington Police Protection & CSD*
• City of Orinda*	• CSA R-4	

*No SOI update

As proposed, the 2nd round parks & recreation services MSR will focus on the following:

- ❖ Updating profile data including growth and population, finances (expenses, revenues, debt, reserves, rates/fee schedules, other fiscal indicators), and staffing/management
- ❖ Capacity of public services, programs and facilities; service to disadvantaged communities
- ❖ Shared services/facilities and collaboration
- ❖ Accountability, structure and efficiencies
- ❖ Governance structure options

The CKH Act requires LAFCO to prepare an analysis of each service provider and a written statement of determinations with respect to each of the following:

- (1) Growth and population projections for the affected area.
- (2) The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the SOI.
- (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 SOI.
- (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.
- (7) Any other matter related to effective or efficient service delivery, as required by commission policy.

A draft scope of services is enclosed with this RFP (Attachment 2). A final scope of services will be negotiated with the firm selected to conduct the MSR/SOI updates and will be included with the professional services agreement to be approved by LAFCO.

V. Budget

Proposals that demonstrate that the final product will meet the requirements of the CKH Act and provide useful information in a concise format at the lowest cost will be looked upon most favorably.

VI. Schedule

The schedule associated with this RFP is shown below:

RFP Issue Date	September 12, 2019
Proposals Due	October 17, 2019
Screening/Consultant Interviews	October 18 – 29, 2019
Commission consideration of contract approval	November 13, 2019
Consultant work begins	December 1, 2019

VII. Proposal Requirements

Responses to this RFP must include all of the following:

1. Statement about the firm that describes history, competencies and resumes of the principal and of all professionals who will be involved in the work, including the following:
 - Management level understanding of how municipal services are financed and delivered
 - Familiarity with the CKH Act, the role and functions of LAFCOs, and the MSR process
 - Experience in governmental organization analysis, including performance measurement and evaluation
 - Ability to facilitate and synthesize input from a variety of sources
 - Ability to interpret varied financial, budget and planning documents
 - Experience with the public input process and presentation and dissemination of information to local agencies and the public for review and comment
 - Availability of all professionals who will be involved in the work, including any sub-consultants.
2. Identification of the lead professional responsible for the project and others who will be involved in the day-to-day work.
3. Identification of any sub-consultants who will be involved. If sub-consultants are proposed, describe the work they will perform and include the same information for each sub-consultant as required for items 1 and 2 above.
4. Description of the anticipated approach for this project, discussion of any suggested changes and/or additional details relating to the draft scope of services.
5. Statement of similar or related experience completed within the last three years and references for each such project, including contact name, address, phone number and email address.
6. An overall project schedule, including the timing of major work tasks.
7. Disclosure of potential conflicts of interest with local agencies in Contra Costa County.
8. Identification of any information, materials and/ or work assistance required from the Contra Costa LAFCO to complete the project.
9. The anticipated project cost, including:
 - a. A not-to-exceed total budget amount.
 - b. The cost and estimated work hours for each major work task identified in the draft scope of services.
 - c. The hourly rates for each person who will be involved in the work, including the rates for any sub-consultants.

VIII. Submittal Requirements

- One reproducible, unbound hard copy and one electronic copy in Adobe PDF format (disk) of the proposal shall be received no later than **4:00 p.m., on Thursday, October 17, 2019**, at the Contra Costa LAFCO office, located at 40 Muir Road, 1st Floor, Martinez, CA 94553 Attn: Executive Officer. No faxed or e-mailed proposals will be accepted. Proposals received after the deadline will not be considered. If delivery is to be in person, please call the LAFCO office at (925) 313-7133 to arrange a delivery time.
- Each proposal shall be submitted in a sealed envelope and marked with the title of the RFP.
- All proposals will become property of the Contra Costa LAFCO.
- Cost of preparation of proposals shall be borne by the proposers.
- Proposals shall be signed by an authorized employee or officer in order to receive consideration.

- Contra Costa LAFCO is not responsible for proposals delivered to a person/location other than that specified herein.
- LAFCO reserves the right to reject any and all proposals.

Summary of Insurance Requirements

Insurance Type	Coverage Limit
General Liability	\$1,000,000
Professional Liability	\$1,000,000
Motor Vehicle Liability	\$ 500,000
Employers' Liability	\$ 100,000
Workers' Compensation	Statutory

IX. Selection Process

Based on relevant work experience, the completeness of the responses, cost and the overall project approach identified in the proposals received, the most qualified firms will be invited, at their expense, for an interview with the selection committee. Tentatively, interviews will be scheduled sometime between October 22nd and October 29th.

Following interviews, the most qualified firm will be selected and a proposed contract for services, including budget, schedule and scope of services will be negotiated. Final selection will be made by LAFCO by approving a contract for services. Action by the Contra Costa LAFCO on a proposed contract is tentatively scheduled for Wednesday, November 13, 2019.

X. LAFCO Contact

Lou Ann Texeira, Executive Officer
Contra Costa LAFCO
40 Muir Road, 1st Floor
Martinez, CA 94553

Phone: (925) 313-7133
Email: LouAnn.Texeira@lafco.cccounty.us

XI. Attachments

1. California Government Code sections relating to MSRs and SOI updates (Attachment A)
2. Contra Costa LAFCO MSR Guidelines (Attachment B)
3. Draft Scope of Services (Attachment 2)

XII. Resource Information

For general information about the Contra Costa LAFCO, including previously completed MSRs, please visit our website: www.contracostalafco.org

ATTACHMENT A – Relevant California Government Code Sections

56430

(a) In order to prepare and to update spheres of influence in accordance with Section 56425, the commission shall conduct a service review of the municipal services provided in the county or other appropriate area designated by the commission. The commission shall include in the area designated for service review the county, the region, the subregion, or any other geographic area as is appropriate for an analysis of the service or services to be reviewed, and shall prepare a written statement of its determinations with respect to each of the following:

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

(b) In conducting a service review, the commission shall comprehensively review all of the agencies that provide the identified service or services within the designated geographic area. The commission may assess various alternatives for improving efficiency and affordability of infrastructure and service delivery within and contiguous to the sphere of influence, including, but not limited to, the consolidation of governmental agencies.

(c) In conducting a service review, the commission may include a review of whether the agencies under review, including any public water system as defined in Section 116275, are in compliance with the California Safe Drinking Water Act (Chapter 4 (commencing with Section 116270) of Part 12 of Division 104 of the Health and Safety Code). A public water system may satisfy any request for information as to compliance with that act by submission of the consumer confidence of water quality report prepared by the public water system as provided by Section 116470 of the Health and Safety Code.

(d) The commission may request information, as part of a service review under this section, from identified public or private entities that provide wholesale or retail supply of drinking water, including mutual water companies formed pursuant to Part 7 (commencing with Section 14300) of Division 3 of Title 1 of the Corporations Code, and private utilities, as defined in Section 1502 of the Public Utilities Code.

(e) The commission shall conduct a service review before, or in conjunction with, but no later than the time it is considering an action to establish a sphere of influence in accordance with Section 56425 or 56426.5 or to update a sphere of influence pursuant to Section 56425.

56425

(e) In determining the sphere of influence of each local agency, the commission shall consider and prepare a written statement of its determinations with respect to each of the following:

(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 a sphere of influence of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, that occurs pursuant to subdivision (g) on or after July 1, 2012, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

(f) Upon determination of a sphere of influence, the commission shall adopt that sphere.

(g) On or before January 1, 2008, and every five years thereafter, the commission shall, as necessary, review and update each sphere of influence.

(h) In determining a sphere of influence, the commission may assess the feasibility of governmental reorganization of particular agencies and recommend reorganization of those agencies when reorganization is found to be feasible and if reorganization will further the goals of orderly development and efficient and affordable service delivery. The commission shall make all reasonable efforts to ensure wide public dissemination of the recommendations.

(i) When adopting, amending, or updating a sphere of influence for a special district, the commission shall establish the nature, location, and extent of any functions or classes of services provided by existing districts.

ATTACHMENT B – Contra Costa LAFCO Municipal Service Review Guidelines

- 1) Purpose - To provide guidance to the Contra Costa Local Agency Formation Commission in preparing and conducting municipal service reviews.
- 2) Background - Effective January 1, 2001, the CKH Act requires LAFCO to review municipal services. The requirement for Municipal Service Reviews (MSRs) is in response to the identified need of a more coordinated and efficient public service structure to support California's growth. The MSR provides LAFCO with a tool to comprehensively study existing and projected public service conditions and to evaluate organizational options for accommodating growth, preventing urban sprawl, and ensuring that critical services are efficiently and cost-effectively provided.
- 3) Goals and Objectives - LAFCOs are required to conduct MSRs and prepare written statements of determinations with respect to each of the following [§56430], as revised 1/1/11.
 - a) Growth and population projections for the affected area.
 - b) The location and characteristics of any disadvantaged unincorporated communities (DUCs) within or contiguous to the SOI.
 - c) 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 DUCs within or contiguous to the SOI.
 - d) Financial ability of agencies to provide services.
 - e) Status of, and opportunities for, shared facilities.
 - f) Accountability for community service needs, including governmental structure and operational efficiencies.
 - g) Any other matter related to effective or efficient service delivery, as required by Commission policy.

As part of the MSR, the Commission may assess various alternatives for improving efficiency and affordability of infrastructure and service delivery within and contiguous to the SOI, including, but not limited to, the consolidation of governmental agencies.

In conducting an MSR, the Commission may include a review of whether the agencies under review, including any public water system as defined in 56430, are in compliance with the California Safe Drinking Water Act. Further, the Commission may request information, as part of an MSR, from identified public or private entities that provide wholesale or retail supply of drinking water, including mutual water companies as defined in 56430.

The MSR process does not require LAFCO to initiate changes of organization based on service review findings; it only requires that LAFCO make determinations regarding the provision of public services per §56430. However, LAFCO, other local agencies and the public may subsequently use the information contained in the MSRs as a basis to pursue changes of organization or reorganization or sphere of influence amendments.

- 4) When Prepared - LAFCO will determine when MSRs are necessary. Generally, reviews will be prepared in conjunction with SOI studies or updates; however, MSRs may also be conducted independent of SOI updates based on a number of factors to be determined by the Commission. Such factors may include public health or safety issues, service provision issues associated with areas of potential growth or development, etc.

Minor amendments to a sphere of influence, as determined by LAFCO, will not require an MSR.
- 5) Services Addressed - MSRs will address identified services within the service review boundary of those agencies under LAFCO's jurisdiction and are associated with growth and development. Target services include, but are not limited to, water, sewer, drainage, libraries, roads, parks, healthcare, broadband (high-speed internet access and use), police, and fire protection. General government services such as courts, social services, human resources, treasury, tax collection and administrative services will not be included.
- 6) Agencies Included - Local agencies whose boundary changes are subject to LAFCO review, or are required to have an SOI, are subject to MSRs, and LAFCO shall encourage those local agencies to fully participate in the service review process. Services provided by other agencies (i.e., federal, state, private) may be included in the service review in order to provide a comprehensive overview of service and provide context.
- 7) Boundaries - LAFCO will determine the geographic boundaries and agencies that will be the subject of an MSR. Factors that may be considered in determining a service review boundary include, but are not limited to, existing city and special district jurisdictional and sphere boundaries; topography; geography; community boundaries; tax/assessment zones; infrastructure locations; transportation systems and roads; areas with shared facilities; areas with shared social and economic communities of interest; plus other factors as determined by LAFCO.

Service reviews may be conducted for a single agency, multiple agencies, on a sub-regional or countywide basis. An MSR may review services outside Contra Costa County, in conjunction with multi-county service providers (e.g., Byron Bethany Irrigation District, Dublin San Ramon Services District, East Bay Municipal Utility District, East Bay Regional Park District). Generally, multi-county MSRs will be prepared by the LAFCO of the principal county (§56066). Inter-agency coordination is encouraged.
- 8) Environmental Determination - The California Environmental Quality Act (CEQA) encourages the consideration of multiple related actions where appropriate. Whenever possible, LAFCO will work to streamline the MSR process by a) integrating SOI proposal processing and related CEQA processes with the MSR process; b) placing high priority on reviews of services affected by pending or anticipated proposals; c) working with city and county planners to identify areas where the short-term conduct of service reviews is needed to support orderly growth and development; and d) requesting that technical information needed for service reviews be included in the General, Specific and Master Service Plans of land use agencies and special districts.

Most MSRs will qualify for Categorical or Statutory Exemption under CEQA, as they are studies and are not typically accompanied by specific development proposals. Subsequent SOI actions may require additional environmental review.

9) Types of Service Reviews - Municipal Service Reviews will fall into two general categories:

- a) Routine reviews are anticipated to be uncomplicated and straightforward with few concerns about the adequacy of public services. Routine service reviews may be conducted for single agencies or for multiple agencies that provide similar services. The boundary of a routine service review may cover a sub-region, region or the County.
- b) Intensive reviews are anticipated to require detailed analysis of complex and controversial issues. An intensive MSR may result from a pending LAFCO proposal, or of service provision concerns otherwise identified by LAFCO.

10) Preparation

- a) The Commission will determine the priority, schedule, procedure and content for service reviews.
- b) LAFCO staff will provide a survey/questionnaire to the affected agency(ies) identified in the service review work plan.
- c) If needed, LAFCO may hold scoping meetings. All affected agencies, interested agencies and persons or entities requesting notice will receive a mailed notice.
- d) LAFCO staff will review submitted MSR information, coordinate and follow-up with the affected agencies.
- e) LAFCO will prepare or cause to be prepared a Draft MSR for circulation to affected agencies and other interested parties for review and comment.
- f) The Draft MSR will be considered at a public hearing, at which time the Commission may accept the report with or without modifications, adopt the required determinations, direct staff to prepare the Final MSR, and take other actions as appropriate.
- g) The cost associated with conducting the baseline MSRs will be incorporated in the annual LAFCO budget, and will be shared by the funding agencies. Agencies requiring a separate or expedited review will be required to fund the MSR.

11) Timing

On or before January 1, 2008, and every five years thereafter, the Commission shall, as necessary, review and update every sphere of influence [§56425(g)]. MSRs will be completed, as necessary, concurrent with SOI formations, updates or substantial amendments, but not less than every five years.

12) Factors for Analysis - As part of its review of municipal services, LAFCO must prepare a written statement of its determination with respect to the following factors. [§56430]

Determination 1: Growth and population projections for the affected area.

The efficient provision of public services is linked to an agency's ability to plan for future needs. Such factors as projected growth in and around the agency's service areas and impact of land use plans and growth patterns on service demands may

be reviewed. In making a determination on growth and population projections, LAFCO may consider an agency's ability to plan for future need.

Determination 2: *The location and characteristic of any DUCs within or contiguous to the SOL.*

Determination 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 DUCs within or contiguous to the SOL.*

The present and planned capacity of public facilities and services is linked to an agency's ability to plan for future needs, including infrastructure (e.g., water, sewer, fire, broadband, etc.). The term "infrastructure needs and deficiencies" refers to the status of existing and planned infrastructure and its relationship to the quality of levels of service that can or need to be provided. In making a determination on infrastructure needs or deficiencies, LAFCO may consider ways in which the agency has the ability and capacity to provide service. LAFCO shall consider service and infrastructure needs related to sewer, water and fire protection within a DUC as defined by LAFCO.

Determination 4: *Financial ability of agencies to provide services.*

LAFCOs must weigh a community's public service needs against the resources available to fund the services. In making a determination on the financial ability of an agency to provide services, LAFCO may review such factors as an agency's potential for shared financing and/or joint funding applications, cost avoidance opportunities, rate structures, and other fiscal constraints and opportunities.

Determination 5: *Status of, and opportunities for, shared facilities.*

If service providers develop strategies for sharing resources, public service costs may be reduced and service efficiencies increased. In making a determination on opportunities for shared facilities, LAFCO may consider if an agency's facilities are currently being utilized to capacity and whether efficiencies can be achieved by accommodating the facility needs of adjacent agencies.

Determination 6: *Accountability for community service needs, including governmental structure and operational efficiencies.*

The service review may include options to provide more logical service boundaries to the benefit of customers and regional planning goals and objectives. In making a determination on government structure, LAFCO may consider possible consolidations, mergers and/or reorganizations. The service review may also consider the agency's management efficiencies in terms of operations and practices in relation to the agency's ability to meet current and future service demands.

Determination 7: *Any other matter related to effective or efficient service delivery, as required by Commission policy.*

Attachment 2

REQUEST FOR PROPOSALS

2nd Round “Parks & Recreation Services” Municipal Service Review

DRAFT SCOPE OF SERVICES

Contra Costa LAFCO will conduct a 2nd round municipal service review (MSR) and sphere of influence (SOI) updates covering “*parks & recreation services*” provided by the cities, dependent districts (County Service Areas - CSAs) and independent districts including parks & recreation districts (RPDs) and community services districts (CSDs) as listed in the table below. The geographic area for this MSR is all of Contra Costa County.

• City of Antioch*	• City of Pinole*	• CSA R-7
• City of Brentwood*	• City of Pittsburg*	• CSA R-9
• City of Clayton*	• City of Pleasant Hill*	• CSA R-10
• City of Concord*	• City of Richmond*	• Ambrose RPD
• Town of Danville*	• City of San Pablo*	• East Bay Regional Park District*
• City of El Cerrito*	• City of San Ramon*	• Green Valley RPD
• City of Hercules*	• City of Walnut Creek*	• Pleasant Hill RPD
• City of Lafayette*	• CSA M-16	• Crockett CSD*
• City of Martinez*	• CSA M-17	• Diablo CSD*
• Town of Moraga*	• CSA M-29	• Town of Discovery Bay CSD*
• City of Oakley*	• CSA M-30	• Kensington Police Protection & CSD*
• City of Orinda*	• CSA R-4	

*No SOI update

Background

California Government Code §56430 requires LAFCO to conduct MSRs to develop information for updating SOIs. The statute requires LAFCO to prepare and adopt a written determination relating to each of the following:

- (1) Growth and population projections for the affected area
- (2) The location and characteristics of any disadvantaged unincorporated communities (DUCs) within or contiguous to the SOI
- (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 DUCs within or contiguous to the SOI
- (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
- (7) Any other matter related to effective or efficient service delivery, as required by commission policy

LAFCO staff will provide information concerning the location of disadvantaged communities. The MSR report will include recommended determinations for the local agencies covered in the report.

California Government Code §56425 requires LAFCO, when determining an SOI, to prepare and adopt a written statement of determination for each local agency regarding the following:

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, that occurs pursuant to subdivision (g) on or after July 1, 2012, the present and probable need for those public facilities and services of any DUCs within the existing SOI (*not applicable for this MSR*).
6. The nature, location, and extent of any functions or classes of services provided by existing districts.

The MSR will include recommended SOI determinations for the CSAs and park and recreation districts noted in the table above.

Focus Areas

As proposed, the 2nd round parks & recreation services MSR will focus on the following:

- ❖ Updating profile data including growth and population, finances (expenses, revenues, debt, reserves, rates/fee schedules, other fiscal indicators), and staffing/management
- ❖ Capacity of public services, programs and facilities; service to disadvantaged communities
- ❖ Shared services/facilities and collaboration
- ❖ Accountability, structure and efficiencies
- ❖ Governance structure options

Service Review Task Overview

The “parks & recreation services” MSR will be conducted in accordance with the California Government Code and local LAFCO guidelines.

Preparation of the MSR will include the following tasks and activities:

1. Data Collection and Review

- Work with LAFCO staff to identify appropriate criteria to be used in service review
- Work with LAFCO staff to develop and distribute initial and supplemental agency requests for information (RFIs)
- Collect information through survey, research, interview, meetings and other appropriate means
Note: In June 2019, Contra Costa LAFCO completed its 2nd round “city services” MSR/SOI updates covering all 19 cities and four CSDs. Some of the general city and CSD information needed for the “parks & recreation” MSR may be found in the 2019 “city services” MSR.
- Compile information in a database or other appropriate format
- Verify compiled information with local agency staff

Timing and work products: On or before (insert deadline), Consultant shall deliver to LAFCO staff complete information for each agency

2. Administrative Draft MSR Report

- Following compilation and analysis of data, prepare an administrative draft MSR report that includes the following: table of contents, executive summary, agency profiles (i.e., population, services/programs, user info, budget/financial info, other relevant info) tables, graphs and agency maps (*mapping will be provided by LAFCO*), quantitative and qualitative information relating to the MSR and SOI factors including discussion of critical issues facing service providers, recommended determinations per 56425 and 56430, governance/boundary options, and recommended SOI updates

- In conjunction with LAFCO staff, distribute administrative draft to agency staff for staff-to-staff review and comment
- Discuss/address comments with local agencies and LAFCO staff

Timing and work products: On or before (insert deadline), Consultant shall deliver to LAFCO staff administrative draft MSR

3. Public Review MSR Report

- Prepare a Public Review MSR report including updated information from Task 2
- In conjunction with LAFCO staff, distribute or make available the Public Review Draft to LAFCO, local agencies and the public (LAFCO typically allows a 30-day comment period)
- Present Public Review MSR report to LAFCO at a public hearing

Timing and work products: On or before (insert deadline), Consultant shall deliver to LAFCO a Public Review MSR (Word and PDF formatted versions)

4. Final MSR Report

- Prepare a Final MSR report incorporating written and oral comments for consideration by the Commission at a public hearing (prepare a comment log, if necessary)
- Present Final MSR report along with recommended determinations and SOI recommendations to LAFCO at a public hearing for adoption
- Based on direction from the Commission and LAFCO staff, and subsequent to the public hearing on the Final MSR report, finalize the MSR report for circulation and posting on the LAFCO website

Timing and work products: On or before (insert deadline), Consultant shall deliver to LAFCO a MS Word formatted and PDF formatted version of the Final MSR report

In accordance with the work plan, Consultant is expected to:

- Conduct the service review process in a collaborative fashion with opportunities for input and review by the local agencies being reviewed.
- Encourage public participation in the service review process.
- Conduct the required analysis in the most cost-effective manner.
- Utilize information that is currently available, including prior LAFCO MSRs, city and county general and specific plans, local agency financial reports, budgets, capital improvement and other planning documents, and related information.
- Create a product that will be useful to the Commission in reviewing and updating SOIs and future proposals for changes of organization, beneficial to agencies as a planning tool, and readily accessible to, and easily understandable by, the general public.

Sample Outline for Parks & Recreation MSR

Given the number of agencies covered in this report, we anticipate using multiple comparative tables and graphs, particularly for the cities, CSAs and CSDs. As shown on the attached, we suggest individual chapters for the four independent parks & recreation districts covered in this report, and summary chapter for the cities, CSDs and CSAs. A sample outline is provided on the attached. Alternative MSR report formats will also be considered.

Sample Outline for Parks & Recreation Municipal Service Review Report

I. Introduction

- 1.1 - LAFCO's Authority and Objective
- 1.2 - MSRs and SOI Updates – Requirements and Determinations
- 1.3 - Local LAFCO Policies
- 1.4 - Acknowledgments

II. Executive Summary

- 2.1 - Report Organization
- 2.2 - Overview of Services Reviewed, Service Providers and Focus Areas
- 2.3 - Key Conclusions and Recommendations
- 2.4 - Global MSR and SOI Determinations

III. Ambrose Recreation & Park District

- 3.1 - Agency Overview
- 3.2 - Boundaries and Demographics
- 3.3 - Services and Facilities
- 3.4 - Finances
- 3.5 - Shared Facilities and Collaboration
- 3.6 - Governance, Transparency and Accountability
- 3.7 - MSR and SOI Determinations and Governance Options

IV. Green Valley Recreation & Park District

- 4.1 - Agency Overview
- 4.2 - Boundaries and Demographics
- 4.3 - Services and Facilities
- 4.4 - Finances
- 4.5 - Shared Facilities and Collaboration
- 4.6 - Governance, Transparency and Accountability
- 4.7 - MSR and SOI Determinations and Governance Options

V. Pleasant Hill Recreation & Park District

- 5.1 - Agency Overview
- 5.2 - Boundaries and Demographics
- 5.3 - Services and Facilities
- 5.4 - Finances
- 5.5 - Shared Facilities and Collaboration
- 5.6 - Governance, Transparency and Accountability
- 5.7 - MSR and SOI Determinations and Governance Options

VI. East Bay Regional Park District

- 6.1 - Agency Overview
- 6.2 - Boundaries and Demographics
- 6.3 - Services and Facilities
- 6.4 - Finances
- 6.5 - Shared Facilities and Collaboration
- 6.6 - Governance, Transparency and Accountability

VII. City Parks & Recreation Services

- 7.1 - Growth and Population Summary
- 7.2 - Disadvantaged Communities Summary
- 7.3 - Existing and Future Facilities and Service Needs Summary
- 7.4 - Financing, Rates and Fees Summary
- 7.5 - Management, Governance and Collaboration Summary

VIII. Community Services Districts Park & Recreation Services

- 8.1 - Growth and Population Summary
- 8.2 - Disadvantaged Communities Summary
- 8.3 - Existing and Future Facilities and Service Needs Summary
- 8.4 - Financing, Rates and Fees Summary
- 8.5 - Management, Governance and Collaboration Summary

IX. County Service Areas – Parks & Recreation

- 9.1 - Growth and Population Summary
- 9.2 - Disadvantaged Communities Summary
- 9.3 - Existing and Future Facilities and Service Needs Summary
- 9.4 - Financing, Rates and Fees Summary
- 9.5 - Management, Governance and Collaboration Summary

X. Acronyms, Glossary and Bibliography